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THE UNIVERSITY OF ALBERTA

THE ROLE OF THE CONSULTANT

by

KONSCTANCIJA GRABSTAS

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH

IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE

OF MASTER OF EDUCATION

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research for acceptance, a thesis entitled "The Role of the Consultant" submitted by Konsctancija Grabstas in partial fulfilment of the requirements for the degree of Master of Education.

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Abstract

The purpose of this study was to come to a deeper understanding of the essential meaning of consulting by probing into the multifaceted function of the consultant, thus determining the consultant's role in the educational system. This task required the identification of sub-problems; as a result, eight areas of particular interest were formulated.

Findings from the literature review indicated that supervision is still in a period of transition and in search of consensus on theory and practice. The need for research to develop new consultation techniques in teacher education which have greater relevance for practitioners is currently being acknowledged in the literature on supervision and consulting.

In the current study, consultants' perceptions were examined concerning their role and function in the system in which they were employed. Their philosophy, skills, tasks, and official job descriptions were researched to ascertain how these variables contributed to their perceptions of their consultancy role. The perceptions of other educators, administrators, teachers, and other consultants were discussed by the consultants to determine how these perceptions help mold the consultant's role composite. The consensus of opinion among all the respondents suggested that the role of the consultant was basically one of helping teachers with concerns and of maintaining a high standard of professional knowledge to be shared with teachers to keep them abreast of educational changes.

It was found that the interpersonal relationships between teachers and consultants must enable the two to give and receive in an honest, open, and non-threatening manner. Due to the nature of the position, many consultants enjoy a great deal of autonomy, as no two consultants are likely to engage in the same activities on a day-to-day basis. As a result, the role of the consultant may be self-defined in one respect; however, the composite of the role is generally molded by all the expectations held by the people who come in contact with the consultant or who are in need of that particular service. The study concluded with a discussion of the implications and suggestions for further research.

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Chapter I

Introduction to the Study

Perceptions in the 1980s about the skill needs of teachers have placed more emphasis on an emerging and important division of general supervision, that of the consultant. The consultant focuses on helping clients improve their performance by developing solutions to problems in a cooperative manner.

Most large school districts employ consultants. The background of these individuals may vary from formal training to regular classroom teachers who demonstrated mastery in knowledge of their respective subject area, as well as expertise in classroom organization and teaching. The consultant, in a helping relationship, is seen as providing expert information, advice or a service. Consultants are concerned with the whole area of staff/professional development. Thus the educational consultant must work with a variety of educational personnel. The consultant's clients' perceptions and expectations concerning the role and function of the consultant "help" mold the tasks of the consultant. Cowle (1971) stated that "a consultant's role in a school system is a composite of all the expectations held by the people associated with the role, including the incumbent" (p. 14). The interaction between these components results in a composite of the consultant's role and function.

Consultants' perceptions of situations and their experiences will cause them to hold certain expectations of the role. The difference and

similarities in expectations for consultants between the various alter groups also affects consultants' perceptions of their role and function. The composite of the consultant's role may change over time, dependent upon their various experiences in working with other educational personnel.

Supervision has evolved from fault finding-inspectional supervision to developmental supervision. The objective of supervision, however, has not changed--to improve teaching and learning and thereby improve the educational opportunities of children and youth. The attitude, then, of teachers toward supervision is determined by the kind of supervision received. In far too many school districts supervision is regarded by teachers with aversion, seeing supervision as inspection for deficiencies or for conformance to external mandates. In sharp contrast, Tanner and Tanner (1987) believed that "when teachers see supervision as a developmental process of cooperative effort toward diagnosing and solving substantive problems in the classroom and school, they are more likely to seek supervisory assistance and their professionalism is enhanced enormously" (p. ix).

In recognition of the need to place current thinking about consulting in an historical perspective, this section provides a brief history of consulting and supervision in education with emphasis on those events that have most influenced the formulation of current theory and practice. Table 1 outlines the evolution of supervisory roles during the past 135 years, as proposed by Wiles and Bondi (1986, p. 7).

Table 1

The Evolution of Supervisory Roles

1850 - 1910	Inspection and enforcement
1910 - 1920	Scientific supervision
1920 - 1930	Bureaucratic supervision
1930 - 1955	Cooperative supervision
1955 - 1965	Supervision as curriculum development
1965 - 1970	Clinical supervision
1970 - 1980	Supervision as management
1980 -	Management of instruction

Wiles and Bondi (1986), p. 7

During most of the eighteenth and nineteenth centuries, supervision was a form of inspection, with emphasis on school supervision as opposed to instructional supervision. The schools appointed boards of lay persons or religious officers to oversee the operation of schools, reviewing school facilities, equipment and the progress of the students attending the schools. Boulet (1981) found that supervision at this time was based on the following three approaches: (a) authority and autocratic rule, (b) emphasis upon inspection and the weeding out of weak teachers, and (c) conformity to standards prescribed by the committees of laymen (p. 23).

In the late 1800s there was growing sentiment for universal education, especially with the increased recognition that all children could benefit from public schooling. During this period between the late 1800s and the 1930s, efficiency became very important, where measurement, testing, and the setting of standards for teachers and students were stressed. The supervision function shifted from lay committees to professional personnel. The principalship became a full-time position, the office of the superintendent grew (as well as the scope of

responsibility), and supervisors assumed the tasks of visiting the classrooms and assessing teachers as a representative of the superintendent. "It was at this time that school supervision first 'crossed over' from a role of direct authority (line position) to one of representative authority (staff position), borrowing its role and power from the office of the superintendent" (Wiles & Bondi, 1986, p. 5). Wiles and Bondi also found that school supervisors during this period were often called "snoopervisors" behind their backs, who worked with "classroom teachers in only the most mechanical ways due to the evaluative dimension of their observations and reports" (p. 5).

The educational orientation from the 1930s to the 1950s shifted to a concern for human relations and cooperative group efforts to improve instruction. Schools became more personal, humane and "child-centered" in their approach to education, and "the concept of supervision as democratic, cooperative, and creative guided the practice" (Burnham, cited in Sullivan, 1980, p. 4). Supervisors spent more of their time helping teachers develop as instructors than judging teacher performance. Three areas of supervision were emphasized during this time period: (a) supervision as guidance, (b) supervision as curriculum development, and (c) supervision as group processes (Sullivan, 1980; Wiles & Bondi, 1986; Gwynn, 1961). Supervision was shared by principals and special supervisors, by assistant superintendents, superintendents of instruction, curriculum coordinators and consultants.

In the late 1950s and early 1960s supervisors became subject specialists. The tasks of the supervisor of the 1960s, according to Wiles and Bondi (1986), were "a combination of interpreting curriculum projects, organizing materials, invdlving teachers in the production of

school programs, and serving as a resource person to teachers in the classroom" (p. 6). With the availability of federal funds during this period, much of the activity in supervision was oriented toward conducting or applying research findings. The accountability movement gave further impetus toward specifying goals, measuring results and application of current research findings. Those responsible for supervisory duties continued to be principals, general and specialized supervisors, and curriculum directors.

The concept of clinical supervision, developed by Morris L. Cogan and others, emerged from Harvard University's Master of Arts in Teaching (M.A.T.) program during the 1950s. Its design shows evidence of the cooperative effort that characterized the 1950s. Cogan (cited in Tanner & Tanner, 1987) held that "clinical supervision is neither counselling nor therapy, but functions as a professional 'colleagueship' between supervisor and teacher" (p. 183). Clinical supervision is conducted in the normal setting of the classroom and school, and involves the gathering of data from direct observation of actual teaching and face-to-face interaction between the supervisor and the teacher in the analysis of teaching behaviors and activities for instructional improvement.

The focus on actual classroom practice and the collegial analysis of instruction helps to ensure that the process is of practical significance to the teacher. The ideal of colleagueship as presented in the design of clinical supervision, however, is not easily achieved under most working circumstances due to the past history of supervision. The supervision literature of the late 1960s and early 1970s was primarily concerned with the analysis of the teaching-learning process and the "new" concept of

clinical supervision.

Since the 1970s research studies have been increasingly directed at studying pupil time-on-task, quality of learning activities, and academic-learning time. "By the late 1970s, however, economic and political pressures on schools had become so great that administrators began returning to an industrial orientation reminiscent of the first quarter of the century" (Wiles & Bondi, 1986, p. 7). Supervisors, however, continued to work with teachers in a collaborative manner, adopting Joyce and Showers' (1982) research on peer coaching.

At the halfway mark of the 1980s, the practice of peer consultation has been advocated and used more widely by school boards. Blumberg (1974) encouraged the development of peer-oriented supervisory structures in the formal school system. Increased recognition and use of peer consultation by Lippitt and Lippitt (1978), Joyce and Showers (1982), Showers (1984, 1985), and Seller (1988) have encouraged additional research into the consultative roles and functions of all those who interact with teachers.

Contrary to the established concept of teacher autonomy and isolated practice, peer coaching is a collegial activity. The peer observations are used in offering feedback on the teaching process and its relationship to student learning. A pre-observation meeting allows for discussion on areas of concern; a post-observation meeting allows for feedback, discussion of classroom observations and the sharing of alternative ways to improve teaching. In this approach teachers provide mutual companionship and support, the sharing of information and instructional expertise, and reflection on successes and failures.

Ideally, both teachers become more conscious and aware of effective

teaching techniques and of various ways on how to implement new strategies into their repertoire. The mentor in this relationship develops leadership, observation and conferencing skills, as well as possible new insights into teaching, while the teacher gains knowledge and expertise as a classroom teacher. The peer observer, while observing their colleague, is also involved in a process of self-evaluation. Showers (1984), in a study of peer coaching, found that peer coaches, after observing and conferencing their peers, "used the strategies in their own classrooms more frequently, skillfully and appropriately than any of the teachers they were coaching. They became, in effect, their own best students as they coached themselves to the next level of master" (p. 50). The process of peer coaching is based on trust, fairness and confidentiality, where improving teaching performance is the goal and improved student learning the ultimate reward.

Tanner and Tanner (1987) suggested that there are four contrasting models of supervision employed by supervisors, as depicted in Table 2. Inspectional and production supervision are the traditional models of supervision, where the teacher is expected to teach an externally established curriculum in a preordained manner. The effectiveness of the teacher is based on learning-outcomes (standardized tests) of the students as well as the teacher's ability to conform to mandates.

Sergiovanni and Starratt (1983) define clinical supervision as "an in-class support system designed to deliver assistance directly to the teacher . . . to bring about changes in classroom operation and teacher behavior" (pp. 299-303). The process of clinical supervision is systematic but not rigid, in that the supervisor is not required to adhere to all of the stages in the cycle. There is no single "style" of

Table 2

Contrasting Models of Supervision

Model of Supervision	Controlling Function	Controlling Milieu
Inspection	Monitoring for accountability; improvement of efficiency; maintenance of "standards"; conformance to preordained segmental goals	Established-convergent; segmental; managerial
Production	Accountability; improvement of efficiency (minimal inputs; maximal outputs); raising "standards" as indicated by test scores; performance by segmental objectives and goals	Established-convergent; segmental; process-product; managerial
Clinical	Instructional improvement; enhancement of teacher-pupil interaction in classroom; enhancement of teacher's insight and competence in instructional methodology	Eclectic; observable classroom behavior; segmental; consultative-cooperative
Developmental	Educational improvement; curriculum improvement; enhancement of teacher's insight and competence in the teaching-learning process; growth in reflective thinking through personal-social problem solving; democratic citizenship; interdependence of goals	Emergent; holistic-interdependent; growth, ecological; cooperative

(table continues)

Model of Supervision	Curriculum	Method
Inspection	Established by external authoritative source; neglect of socialization goals; segmental studies; (focus on basic education, fundamental academic subjects, facts, and skills)	Time-on-task; mental discipline; "mastery" of academic subject matter; skill and drill
Production	Established by external authoritative source; neglect of socialization goals; segmental studies; (focus on basic education, fundamental academic studies, facts, and skills)	Behavioristic objectives; time-on-task; academic-learning time; "mastery" of academic subject matter; skill and drill
Clinical	Eclectic; established by external authoritative source; focus on instruction; consideration of socialization goals	Consultative; analysis of teaching (observable classroom behavior)
Developmental	Developed cooperatively and continuously with teachers, curricularists, supervisors, administrators, and students; interdependence of academic socialization goals; (comprehensive, inter-disciplinary studies focused on ideas, issues, problems, generalizations, and applications)	Democratic-participative; problem solving; use of subject matter as means for adding meaning to experience

Tanner and Tanner (1987), p. 188

clinical supervision, but rather a variety of approaches. In this approach the emphasis is on cooperative planning and collegial working relationships between supervisors and teachers. The supervisor is viewed as being in a consultative-cooperative role. The main focus with this approach is on classroom instruction (observable classroom behavior), while leaving problems and concerns relating to curriculum (design and development) and evaluation to higher levels of administration.

In developmental supervision the learning environment and process is viewed as emergent, where both the teacher and the learner bring insight to the subject matter. The curriculum is also regarded as emergent, requiring continuous development by teachers, supervisors, curricularists, administrators and students. Teacher effectiveness in this approach "is based on the development of the capacity and commitment to solve educational problems and to enhance the growth of the learner as an autonomously thinking, socially responsible member of a free society" (Tanner & Tanner, 1987, p. 187). This approach recognizes that teaching (and learning) is highly emergent and personal.

The traditional model of supervision as inspection came to be regarded as dysfunctional in the light of research on motivation and group interaction. Clinical supervision provided a framework for a collegial working relationship with the supervisor and teacher, focusing on instructional improvement by analyzing the act of teaching. The fundamental premise of developmental supervision is that education is a process of growth for both the teachers and their students.

The knowledge base for educational supervision is in a continual state of development. This knowledge base is expanded as practical solutions to problems are found and new issues and concerns are raised.

However, the best knowledge will remain only theoretical unless implemented by supervisors and consultants, and this depends on practical solutions to such mundane but important concerns as time for supervision and role clarification. Tanner and Tanner (1987) believed that "supervision is lagging far behind the best theory, which conceives of teachers as professionals and supervisors as real leaders who help teachers face their professional problems and continually grow in the ability to relate theory to practice" (p. 49).

The Problem

Yet, it appears that many educators hesitate to agree upon a precise definition of the role and function for personnel engaged in such designated positions. The major purpose of this study was to come to a deeper understanding of the essential meaning of consulting by probing into the multifaceted function of the consultant, thus determining the consultant's role in the educational system. Seven areas of particular interest will be studied, as listed under the sub problems.

Sub Problems

1. What are the predominant orientations in consulting practice?

1.1 What are the prevailing orientations of educational research in consulting?

2. What is the demographic background of individuals in consultancy positions?

3. What are the perceptions of consultants concerning their consultancy role?

3.1 For which educational concerns do consultants report having

provided consultative assistance?

4. What kind of cooperation is expected and experienced between administrators and consultants?

5. What kind of cooperation is expected and experienced between teachers and consultants?

5.1 What process do consultants follow when working with teachers in need of assistance?

6. How do consultants measure their own effectiveness?

6.1 How and by whom are the consultant's services assessed?

7. What are issues of concern for consultants?

Significance of the Study

Relatively little research has been published concerning the role and function of educational consultants. It would seem then that a clear identification of the issues surrounding the consultant's role and function is necessary to help facilitate the reduction of role confusion and ambiguity by both teachers and consultants. Consideration of the consultants' perspective of their role will help clarify misperceptions by both administrators and teachers.

This area of research seems to have received little attention even though consultancy has been considered an important means by which to improve the quality of instruction and teacher effectiveness. The role itself is being adapted by consultants and administrators as the emphasis on teacher improvement and teacher effectiveness changes. If there is an inconsistency between job descriptions and the actual work performed, this needs to be recognized and adjusted accordingly. Either job

descriptions should reflect the nature of consultancy work as it is done, or the work should be altered to match the expectations of the job.

Operational Definition of Terms

Consultant: A person appointed by a school board to assist teachers/educators (principals, district office staff).

Conferencing/Consultation/Consultancy: The operational definition of these synonymous terms is used as follows: an exchange of advice and/or assistance between the classroom teacher and the consultant.

Instructional Improvement: That which is provided by the consultant to help teachers to improve their classroom behavior in such a way as to enhance the learning process.

Role/Function: This term refers to both the consultant's expectations and the expectations of others whom the consultant perceives as important in defining what they do. The consultants' functions are the designated tasks that they complete.

Teacher: Those who hold an Alberta Teaching Certificate and whose school assignment is classroom teaching.

Organization of the Thesis

The thesis is organized into five chapters. The first thrust of the thesis described the theoretical basis for conceptualizing the meaning of consulting. Secondly, in a practical thrust, interviews with educational consultants and the implications generated from the research data were described. Chapter 1 placed current thinking about consulting in an historical perspective through an examination of those events which influenced the formulation of current theory and practice. This was

followed by statements of purpose and research questions, and the rationale for the thesis, concluding with an overview of the thesis.

Chapter 2 described some theoretical and practical components of consultancy according to key authors in the consulting field. The review of the literature closed with a summary of recent educational research studies in consulting. The chapter concluded with a summary of the conceptual framework for the research study.

Chapter 3 outlined the dominant research paradigm and its underlying assumptions that was utilized for the study. The procedure adopted for this study encompassed the naturalistic research paradigm, employing qualitative methodology with phenomenological and symbolic interactionist perspectives. Finally, an outline of the pilot study, along with the rationale behind the selection of the research instruments and data collection procedures, were described.

Chapter 4 introduced the practical dimension of the study with a phenomenologically oriented description of the lived experiences of five educational consultants, which provided the primary data for this inquiry. Included in the chapter was an interpretive summary of the interviews, followed by a summary of the emergent themes present in the unique and shared experiences of the consultants. A brief summary of the research findings provided a synopsis of the chapter.

Chapter 5 critically examined the consultants' interpretations of their roles and functions in the educational system through reference to current research and additional referential materials obtained during the study. Following the summary, findings, and implications, suggestions for advancing educational research in consulting were provided.

Chapter II

Review of the Literature and Conceptual Framework

This chapter provides some theoretical and practical components of consultancy according to key authors in the consulting field, as well as a synopsis of some current research studies. Since the major focus in this study was on consultants' perceptions of their role and function, an integral part of the study's design included a review of the nature of consulting. The present section, therefore, presents a brief description of (1) the nature of consultancy tasks, (2) role expectations, (3) the consultant's function, and (4) research into the consultative role and function.

The Nature of Consulting Tasks

Research indicated varying perceptions on the tasks and responsibilities of educational consultants. Some suggested tasks included planning and organizing in-services, conferencing with teachers, instructing, analyzing, and suggesting alternatives and potential solutions to problems. The consultative styles identified by Faust (1975, pp. 227-239) are differentiated into four categories: (a) crisis consultation, (b) intervention consultation, (c) prevention consultation, and (d) developmental consultation. The consultant must be able to differentiate the needs of the teacher given what data are supplied, which can be difficult and challenging at times, and use the appropriate style or approach.

Another approach to improving teacher effectiveness, related to consulting, is that taken by Cawelti and Reavis (1980, p. 236), who listed four instructional improvement processes that school systems could use to provide instructional help to teachers: (a) curriculum development, (b) clinical supervision, (c) staff development, and (d) teacher evaluation. According to the authors, these components should be available to all teachers. Cawelti and Reavis define clinical supervision as being a three-fold process, where planning sessions/conferences are held with the teacher before the classroom visit, leading to observation of the teacher's lesson/instruction. The final stage of the process begins where the learning process is analyzed with the teacher, and where, in some instances, alternative teaching methods are generated cooperatively.

To be effective, then, consultants must command an up-to-date knowledge of both "instructional theory and of skill in its practical application with teachers" (Goldhammer, Anderson, & Krajewski, 1980, p. 49). To be an effective supervisor, Goldhammer et al. also indicated that the person in that position needs to know "how to assess, and then to contribute toward the improvement, of the self-view (both personal and professional) that the teacher appears to have" (p. 49).

Tharp (1975, p. 136) also saw consultants in a helping relationship with their clients, and believed that the provision of consultative assistance should include (a) reinforcement, (b) instruction, (c) modeling, (d) feedback, and (e) cognitive restructuring. These assistance tasks help the teacher as well as the student, thus forming a triadic helping relationship in Tharp's model. Similarly, Doll (1983) believed that in order to effect a desired change in teachers' values and

attitudes, the use of "observation, interview, brainstorming, group discussion, buzz sessions, role playing, and guided practice" (p. 202) were necessary.

Clinical supervision was conceptualized by Anderson and Krajewski (cited in Goldhammer et al., 1980, p. 26) as including the following aspects:

1. A technology for improving instruction;
2. A deliberate intervention into instructional processes;
3. Goal-oriented, combining school and personal growth needs;
4. A working relationship between teachers and supervisors;
5. Requiring mutual trust;
6. A systematic process that requires a flexible methodology;
7. An approach that generates a productive tension;
8. Assuming that the supervisor knows more about instruction and learning than teachers; and
9. A system that requires training.

These nine elements, as suggested by Anderson and Krajewski (cited in Goldhammer et al., 1980), are the most important "to develop a mindset or belief system about a goal approach to coaching teachers" (p. 27). In "coaching" teachers, the clinical supervision approach includes a pre-observation conference, observation, an analysis and strategy session, conference, and a post-observation critique, all interconnected to help teachers in a collegial manner to continue to expand their professional development.

Wiles and Bondi (1986, pp. 16-22), in consultation with educational supervisors, identified eight areas of competence for supervisors: (a) developers of people, (b) curriculum developers, (c) instructional

specialists, (d) staff developers, (e) administrators, (f) managers of change, and (g) evaluators. They reinforce the opinion that supervision is a complex role where supervisors must be able to make the transition from thinking about desired programs to evaluating teachers. Wiles and Bondi also noted that supervision tasks could be broken down into either supporting (assisting), coordinating (linking), or building (developing) school programs. The degree of emphasis on these areas "is often a matter of philosophy and role definition by the supervisor or his or her superiors" (p. 73).

As consultancy positions became available, many consultants were chosen from the ranks of teachers. Most often, those chosen were "master teachers" taking on the responsibility for helping others in their specific field from either a staff or a line position. As the role began to change, these individuals found themselves engaged in new tasks, adapting to the new expectations of their changing role.

Role Expectations

Due to the nature of the position, many consultants enjoy a great deal of autonomy, as no two consultants are likely to do the same thing on a day-to-day basis. "This differentiation of roles means that job descriptions for supervisors are likely to be nebulous and, to a great degree, the supervisory role may be self-defined" (Wiles and Bondi, 1986, p. 13).

Goldhammer et al. (1980) further reinforced this by stating that "the supervisor's role is very often too generally defined, and it varies from school system to school system" (p. 16). In addition, the supervisor can be referred to by various titles, such as helping teacher,

resource teacher, instructional specialist, master teacher, coordinator, curriculum specialist, educational assistant, consultant, advisor, department head, director (and the list continues), which further complicates things. Bell and Nadler (1979) have found that

> an understanding of the roles in the client-consultant relationship is important in order to (a) aid both parties in the search, (b) specify mutual expectations and minimize confusion, and (c) help the consultant identify the skills and competencies associated with different ideas. (p. 39).

The role of the consultant may be self-defined in one respect; however, the composite of the consultant's role is generally molded by all the expectations held by the people who come into contact with the consultant or who are in need of that particular service. Pickhardt (1981) believed that the helping skills which consultants use are taken for granted because it is perceived as "a basically simple, straightforward act" (p. 531). The helping powers of consultants are complex and very diverse, but to ensure that teachers' expectations are realistic, this helping "power" must be clarified. Pickhardt stated that "the teacher wants a magical solution and ascribes magical helping powers to the supervisor" (p. 531). Unfortunately, when these expectations are not realized, teachers become disappointed and disillusioned concerning the helping relationship of the consultant. As McDaniel (1981) indicated, this leads to the "can't win" dilemma that results from the contradictory expectations of teachers themselves (p. 510).

Harnak (1968, p. 121) saw improvement of teacher support services as being dependent on teachers making their needs known to support staff. The consultants therefore must make the teacher aware of their services and role in the educational system. In Haughey's study (1976), 80 teachers from three elementary schools were asked to provide information

concerning their consultative needs, the personnel whom they consulted, their perceptions of themselves as consultants, their satisfaction with the consultative assistance which they received, and their reasons for not seeking assistance. Haughey found that much of the consultative assistance required by classroom teachers was obtained from internal personnel within the teacher's home school, such as the principal, assistant principal, department heads, and colleagues.

Blumberg (1980), in his book Supervisors and Teachers: A Private Cold War, illustrated the mistrust that has grown between teachers and supervisors. McDaniel (1981) noted that teachers often have a less than complete understanding of a supervisor's role and responsibility, where it appears to teachers that "supervisors seem to have left the difficult job of teaching for the leisurely life of administration. A better salary, secretarial assistance, more authority, and less work--from the teachers' perspective, supervisors have the best of all possible worlds" (p. 519). According to Sergiovanni and Starratt (1971), "the process of supervision is viewed by teachers, students, and others on a continuum extending from outright hostility through indifference to outright enthusiasm. How one views supervision depends largley upon one's past experience with supervisory practices" (p. 9). According to Goldhammer et al. (1980),

> teachers generally dislike being the object of supervision. They tend to perceive supervision as inherent in the administrative hierarchy and to see the supervisor as being somewhat of a threat. Supervisors, on the other hand, perceive supervision as teacher-oriented, leading to an improvement in teaching, curriculum, and the total educational program. They envisage their role as helping teachers to improve instruction, a basic goal of supervision. That still other perceptions are held by administrators, with diverging viewpoints of supervision as either a staff or line role, further beclouds the supervisor's role. (p. 14)

Since consulting (supervising) requires a collegial relationship, this is the first barrier that must be overcome.

Haughey (1976, pp. 15-18) also has reported some studies that have been completed on the role of various central office supervisory personnel. One in particular, by McLoughlin, sought the opinions of various educators to define the role of elementary education supervisors in British Columbia. The functions most commonly mentioned were to provide assistance to teachers and principals, to help obtain instructional materials, to give demonstration lessons, and to arrange for intervisitations of teachers. Similarly, Lucio and McNeil (1969) saw the supervisor's function as "the promotion of improvement of teaching and the curriculum through advice from instructional specialists to teachers, principals, assistant superintendents and others" (p. 24). Goldhammer et al. (1980) saw the supervisor's role "encompassing these basic components: administrative, curricular, and instructional" (p. 20). From the discussion on role responsibilities, it can be inferred that describing the role of the supervisor is a task which is not easily realized, especially when the terms supervisor and consultant can and are used interchangeably, as indicated by Tanner and Tanner (1987): "There are supervisors who are generalists and supervisors of specific subjects; there are supervisors of services and supervisors of instructional media. However, all are usually known simply as supervisors or consultants" (p. 103).

Matthews (1983) described a continuum of roles that consultants assume, varying from "standard" to "process" consulting (p. 19). There is a progression from standard consulting, which is directive, consultant centered, to process consulting, which is less directive, client

centered. The role of consultant moves along a continuum from standard consulting--advocate, doctor, expert, fact finder/analyst, teacher/trainer, joint problem solver, confrontationalist, catalyst--to acceptant consulting, which is at the end of the continuum, and as a result is the most process-oriented form of consulting. Matthews indicated that a "successful consultant will be able to play as many roles during the course of the project as the different situations or stages of the project require" (p. 21).

Wiles and Bondi (1986) indicated that the roles in supervision are multiple due to the numerous environments and situations in which the supervisors must operate within the parameters of their position. Below is the list generated by Wiles and Bondi:

1. Expert--sometimes the consultant is the source of knowledge or skill in an area.
2. Instructor--the consultant may take the role of instructing about an area of knowledge.
3. Trainer--a trainer goes beyond instruction in that he helps people master "do it" behavioral skills in performing actions.
4. Retriever--the retriever brings what is needed to the client system.
5. Referrer--the referrer sends the client system to a source where it can find what it needs.
6. Linker--the linker provides a bridge to parties, or parts of a system, that need to be in contact.
7. Demonstrator--the demonstrator shows the client system how something is done, but does not necessarily show him how to do it for himself.
8. Modeler--the modeler provides an example of how to do, or be, something by evidencing it as his (the consultant's) own behavior.
9. Advocate--there are times when a consultant can best facilitate an intention by taking the role of advocate for a goal, value, or strategy.
10. Confronter--when the client system needs to be confronted with awareness of a discrepancy.
11. Counselor--the role of the counselor generally includes listening, acting as a sounding board, and raising awareness of alternatives. It is a nondirective effort in helping the client think through issues.

12. Advisor--the advisor role differs from the counselor in being more directive about what the client might do and how to do it.
13. Observer--the observer comments on the things that exist and how things are being done.
14. Data Collector--the data collector gathers information about what exists and how things are being done.
15. Analyzer--the analyzer interprets the meaning of data found in the system.
16. Diagnoser--the diagnoser uses analyses, data, and observations in determining why things happen the way they do in the system.
17. Designer--the designer develops action strategies, training programs, and management models for use by the system.
18. Manager--the manager takes charge of the development process by ordering events to achieve accountability.
19. Evaluator--the evaluator serves to feed back information that will make the system more effective in its task. (pp. 41-42)

Like the roles of supervision, the tasks associated with the position are also numerous. The roles and tasks performed by any one supervisor or consultant will vary from school board to school board, from teacher to teacher, and from consultant perceptions to organizational perceptions. This view is a product of both the consultant and the incumbents.

The Consultant's Function

Lippitt and Lippitt (1978) believed that "the function of consultation is part of the role and function of all those who lead, direct, teach or interact as friends or peers with others." They further reinforce this statement by saying that "the role of a growing number of persons in our society is labeled 'consultant' to describe their helping functions." The consultant's interaction with others can be described as a "helping relationship" (p. ix). In this helping relationship the consultant helps to solve a problem, satisfy a need or change a situation to improve teacher effectiveness.

Reavis (1978) believed that "clinical supervision emphasized teacher growth," whereas "traditional in-class supervision emphasized teacher defects" (p. 10). He viewed clinical supervision as a process aimed at helping the teacher by developing solutions to problems in a cooperative manner. Clinical supervision, therefore, in Smyth's (1986) opinion, "provides a way of endorsing a quite deliberate set of values that regard teachers as autonomous and knowledgeable, and capable of working collaboratively to expose their own dilemmas and their own sense of their own inconsistencies in their teaching" (p. 73).

Enns (1963) described the consultative function as "providing for the continuous professional development of teachers, and includes all those activities normally designated as in-service education" (p. 28). Enns also indicated that some functions are best performed by generalists and others by specialists, where some require the attention of internal consultative personnel, while others need interaction from external consultative personnel. Parker (1975) described the purpose of psychological consultation as increasing "the day to day effectiveness of such persons as para-professionals, clergymen, teachers, school and business administrators and parents" (p. 2).

Goldhammer et al. (1980, p. 27) believed that there were three kinds of knowledge and skills that supervisors must possess if they were to effectively help teachers. The three areas were identified as (a) the need for supervisors to know how to examine each teacher's role-improvement needs, (b) the ability to help the teacher experience growth-in-service, and (c) the need for supervisors to have a substantive knowledge base. In order to achieve this, the interaction between the consultant and teacher must be honest, open, supportive and productive.

Vyskocil (1979) believed that the problem solving in supervision "involves the teacher and supervisor mutually defining and examining all potential solutions and alternatives, and selecting the best approach based upon the needs of the students or clients" (p. 176). Concerning effective supervision, Blumberg (cited in Vyskocil) states that "the interpersonal relationships between a teacher and a supervisor must enable the two to give and receive in a mutually satisfactory way" (p. 176). In that sense, then, "supervision is in fact a teaching role" (Goldhammer et al., 1980, p. 27).

Research into the Consultative Function

Pfeiffer and Dunlap (1982) have found the whole realm of supervision to be a "very complex and diversified area of study," finding that no one theory of supervision was generally accepted, but that several different approaches to supervision were present in the "real world" (p. 9). Joyce and Showers (1980, p. 379) suggested that the actions woven into a supervision program should have impact in at least four areas, regardless of the model chosen: (a) creation of awareness, (b) development of concepts accompanied by an increase in organized knowledge, (c) acquisition of skills related to principles, and (d) application of learning to solve instructional problems. They note that "research so far indicates that teachers are 'wonderful learners,' that teachers should have the best of conditions for learning, and that these desirable conditions do help teachers learn" (p. 379).

In one school system, researched by Doll (1983, p. 227), teachers who had been involved in a number of supervisory activities were asked which actions they preferred. They selected the following, in order of

preference: (a) small-group discussions of currently troublesome matters, (b) demonstrations of innovative ideas and materials, (c) workshops with consultants present, (d) work groups to produce ideas and, subsequently, documents, and (e) opportunities to talk with individuals who have had much experience in teaching. This would support the idea that teachers no longer want to work in isolation; putting the teachers on a one-to-one basis with other persons as consultants and peers (coaching) specifically to help individual teachers helps to eliminate these feelings of isolation.

Blumberg (1974, p. 82) asked 50 supervisors to recall something favorable that had occurred in their work with teachers. The most favorable experiences seemed to come when supervisors were able to get teachers to try different ways of doing things or when they were able to change the way that teachers thought or felt about their job (43%). Secondly, the supervisors needed to be seen as a source of help (29%), which also supports the concept that "the long-term effect of a supervisor's being asked for help, particularly by several teachers, is that aspect of his role is legitimized in the school" (p. 83). The supervisor also needed to be seen as productive, to justify the role (15%). The last two factors, a need for open communication (9%) and a need to influence the organization (4%), appear to play a minor role in the satisfaction that supervisors derive from working with teachers.

Though some teachers may wish it otherwise, the main thrust of supervision is on the individual teacher. Acheson and Gall (1987), in a study of 2500 teachers conducted by Wiles, found "that only a small fraction of them (1.5%) perceived their supervisor as a source of new ideas" (p. 6). Blumberg (1974) reviewed studies of teacher supervision

conducted by himself and others and found that teachers viewed supervision "as a part of the system that exists but that does not play an important role in their professional lives, almost like an organizational ritual that is no longer relevant" (pp. 12-13). Most teachers do not like to be supervised, even though it is a required part of their training and profession.

Cawelti and Reavis (1980) investigated the way 16 school districts provided instructional leadership in the four areas listed earlier in this report (p. 15). The research team visited school systems in seven large cities, six medium-sized cities, and three suburban communities, collecting data through interviews and questionnaires. Teachers, principals, supervisors and superintendents were asked to rate the four instructional services on a Likert scale. In this study only 15% of the teachers reported having any experiences with clinical supervision, except in medium-sized cities where about a fourth indicated that a clinical supervision model was followed. This would indicate that consultation in 1979-80 in the United States, as well as supervisory activities, were not a priority in the school districts studied.

Cowle (1971) examined the role of "recently" (1970) appointed elementary field consultants. Questionnaires were sent to 10 central office personnel, 110 elementary school principals, 9 field consultants, 30 elementary coordinators, and 210 elementary teachers. Central office personnel and field consultants were also interviewed. In this study the role was defined as being one to help classroom teachers maintain, by in-service education, a high standard of professional knowledge and competence in teaching. Cowle also claimed that the part-time consultant was able to liaise between all personnel providing a relationship as a

practicing teacher (p. 104).

Another master's study on consultative needs and practices was conducted by Plamondon (1973). Data were obtained from a questionnaire sent to 135 teachers (K-12) teaching in five Alberta schools within one school district. In addition to the questionnaire, Plamondon conducted interviews with four teachers from each school. From the data gathered, Plamondon was able to identify four major consultative concerns, including (a) obtaining student background information, (b) assessing need for remedial programs, (c) implementing remedial programs, and (d) developing course outlines. Department heads, colleagues and guidance counsellors were found to be favored consultants for teachers.

In 1976 Haughey sought to describe consultative practices in three elementary schools in a small Alberta school system (see p. 18). Among the major specific findings were that more than 50% of teachers desired assistance and that teachers considered colleagues to be a major source of consultative assistance. Haughey found that the satisfaction of the consultative interactions decreased with increasing years of teacher education and with total years of teaching experience. One third of the teachers did not seek assistance because they did not consider their concerns to be crucial, they did not know whom to ask, they did not have time or materials, or because they obtained information without seeking consultative assistance. Teachers preferred in-school personnel for consultative assistance in the area of student needs, department heads in the area of curriculum and other teachers in the area of instructional ideas and methodology.

Harrison (1978) examined the consultative needs and practices of junior high teachers from 16 schools in four Alberta districts. A

questionnaire was sent to 358 teachers and another questionnaire to 66 supervisory personnel. The teachers requested consultative assistance regarding concerns such as (a) discipline problems, (b) student irresponsibility, (c) maintaining high levels of interests, and (d) preparation time. The specific areas teachers wanted assistance in included (a) obtaining student background information, (b) developing course outlines, (c) selecting instructional materials, and (d) diagnosing learning difficulties.

Harrison (1978) found that 85% of the teacher participants sought assistance from colleagues, while 27% approached principals and 11% contacted either regional or central office staff. The supervisory personnel involved in the study perceived the main concerns of teachers to be (a) developing course outlines, (b) selecting instructional materials, (c) planning lessons, and (d) motivating students. Principals perceived the main concerns to be (a) solving teacher-pupil problems, (b) motivating students, and (c) establishing classroom control. Approximately one third of the teachers stated that they desired consultative assistance but did not seek it because of a lack of time, lack of information and a shortage of available personnel. Supervisory personnel indicated that teachers failed to utilize consultative services because of the implication of incompetence, lack of direction from administrators, and because teachers felt they were capable of solving their own problems. The Harrison study substantiated the findings of both Plamondon (1973) and Haughey (1976).

The Millikan (1979) study on "Consultative Needs in Senior High Schools" involved questionnaires and interviews with 260 teachers and 31 consultants/supervisors in one school district in Alberta. Millikan

sought to examine the degree of consultative interaction by identifying the extent to which teachers request, seek, and provide consultative assistance, as well as to describe teacher concerns and perceptions of district supervisors and consultants. Millikan found that most consultative assistance was provided by colleagues, while only 3% of requested consultative assistance was provided by external school district personnel. Twenty-one percent of the teachers indicated that they did not seek needed consultative assistance because of a lack of time or inadequate access to external consulting personnel. The most frequently mentioned concerns of the teachers were those related to tardiness and absenteeism, determining established program standards, and planning and evaluation procedures. Supervisory consultants reported providing assistance in determining school programs and standards, selection of instructional materials, and obtaining information on professional development programs.

This study indicated a need to differentiate between the role and functions of the supervisor and those of the consultant. Millikan stated that

> because of perceptions held by both parties about the supervisor's role, the task for the supervisor of completely separating or removing an evaluative component from the provision of advice and/or assistance to a consultee-teacher will be extremely difficult, if not impossible. (p. 24)

A supervisor has "authority" over those being supervised; a consultant, on the other hand, generally carries no formal evaluative component, but rather functions as a resource person, facilitator and helper, which removes the potential threat of negative consequences. Smyth (1986) found that clinical supervision

> provides a way of endorsing a quite deliberate set of values that regard teachers as autonomous and knowledgeable, and capable of working collaboratively to expose their own dilemmas and their own sense of the inconsistencies in their teaching, as well as tackling their own incompleteness with which they regard their own assumptions, beliefs and values of the wider process of schooling. (p. 73)

In a study completed by Scott (1981), 50 consultants in five core subject areas at elementary, junior high and senior high schools were asked to complete a questionnaire on conceptual components of consultancy. A random sample of consultants was contacted for personal interviews. The data presented by Scott indicated that there was a multitude of job perceptions, resulting in frustration, confusion and uncertainty for consultants. From his sample of 50 consultants he found that most consultants satisfied lower-order needs of teachers, that for many consultants the lack of a definite role description led to frustration, tension and inconsistency, and that consultants operating with a growth-oriented conception of consultancy enjoyed the freedom and professional independence of nebulous role definition (p. iv).

Favaro (1982) completed a study on re-searching the meaning of consulting in continuing teacher education. Favaro worked with the hypothesis that the general dissatisfaction among participants in teacher education programs, and the appearance of a lack of teachers' confidence in the abilities of in-service personnel to engage in meaningful honest relationships with teachers, has always been present in the educational system (p. 6). The study was based on a perceived need to reassess critically consultative relationships in education.

Interviews and three group sessions with six educational administrators and teacher educators were conducted over a three-month period to come to a deeper understanding of the participants' experiences

in order to reveal what it was like to consult and be consulted. The second thrust of the study described the attempts of six research coparticipants who probed into their thoughts and actions in consulting and as a result their plan for recasting consultative relationships with teachers in the context of a specific program in teacher education.

Throughout the interviews, Favaro (1982) examined the process of consulting and found that the respondents repeatedly expressed a deeper level of consulting where they felt they (a) touched and were touched by another, and (b) helped others to free themselves, and where, in the process, those individuals reached out to others. The consultants viewed themselves as (a) coparticipants, who gradually "moved behind the scenes" to allow the consultees to find their own answers, and (b) professionals who constantly grow in their awareness of themselves and their relationships with others.

Six weeks following the writing and distribution of the initial draft of the interpretive summary of the interviews, the participants gathered for their group sessions. Favaro (1982) found that in the discussions which followed participants acknowledged that the view of consulting as a working relationship had some validity but was a restricted view which failed to account for the freeing element which they felt was fundamental in a helping relationship. The respondents rejected the idea that consulting meant adapting to the system; rather, consulting meant freeing the teacher to try new ideas, new methodologies, "to convey to the consultee that you respect him as a human being who can answer his own problems and then to establish a contextual framework within which he can find his own answers" (p. 181).

Piekema (1987) sought to discover what made a teaching consultant

effective through examination of the qualities and competencies of an effective consultant as seen through the eyes of a consultant and the consultant's clients. Data were obtained through a series of interviews with one consultant, as well as field observations of three consulting situations.

The consultant perceived that her function was seen by some principals as a person to "fix things." Piekema reported that the participant, however, saw her work as "a two-way street where she responded to teachers' needs, elmininating some of the fear associated with a new idea or method by helping them through it, but where teachers must have personal, active input" (p. 24). From the data gathered, Piekema was able to identify four major qualities and competencies that consultants must possess: (a) a clear understanding of their role and that of their clients; (b) an ability to take on any role: diagnostician, information specialist, solution builder, evaluator, process helper, facilitator; (c) an understanding of how adults learn; and (d) an understanding of how change takes place. Piekema did find, in the case studies (field observations), confusion about role expectations for the consultant from the consultant, principal and clients. Piekema was able to generate an extensive list of qualities and competencies that consultants should possess according to the teachers interviewed. Collaboration was listed as one of the most important and indispensible aspects of consulting. The consultant must also (a) be aware of the political aspects of the school, (b) uncover hidden agendas, (c) be able to deal with clients who see problems from a biased perspective, (d) ensure that enough time is given, being aware that quick results are unlikely, and (e) account for the uniqueness of the individual (history,

strengths, weaknesses) (p. 92). Consultants encounter a variety of situations where they will require sensitivity and adaptability if they wish to meet the needs of clients.

English and Steffy (1983, p. 9) identified consultants as being either internal or external to the client group or organization. An external consultant is not affiliated with the organization in any way, whereas the internal consultant is part of the client organization or connected to it in some manner. The authors listed six "successful characteristics of educational consultants" (p. 17):

1. Technical competence (expertise);
2. Client centered;
3. Excellent communicators and teachers (successful consulting is basically successful teaching);
4. Skilled analysts and negotiators;
5. Task oriented and productive; and
6. Possess sound human relations skills.

Certain skills are essential to be an effective consultant, suggested English and Steffy (p. 39). These skills would include: listening, empathizing with the client's needs, recognizing the client's potential and utilizing the client's resources, a sense of timing, and giving information. The authors also offer the following general advice pertaining to rules of conduct or ethics of consulting (p. 187):

1. Stay in your general area of expertise;
2. Retain independence from conflict of interest;
3. Do not create client dependency;
4. Do not perform work of the client; and
5. Maintain confidentiality.

Havelock and Havelock (1973) also believed that "above all, change agents must be able to relate to people at various levels in a system, sometimes in situations of great ambiguity . . . prior skills are most crucial in the areas of human relations and communication" (p. 69).

Similarly, Blocher (1975, pp. 159-160) believed that consultative effectiveness is dependent on at least six factors:

1. The method of intervention;
2. The characteristics of the consultant;
3. The characteristics of the consultee;
4. The nature of the concern;
5. The nature of the behavior change; and
6. The nature of the context in which the consultation takes place.

Where possible, it would be ideal to match consultants and their field of expertise and knowledge with their clients' needs and concerns to maximize the effectiveness of their interaction and the helping relationship.

Lippitt and Lippitt (1978) surveyed 32 consultants for their perceptions of what is required of a good consultant and summarized consultant competencies (Table 3) as "one step toward identifying competencies" (p. 97). According to the authors, consultants need skills and knowledge for several types of work, specifically (a) task work, which included mobilizing resources, setting goals, and developing evaluation strategies, and (b) process work, which involved mediating conflicts, developing trust, and uncovering hidden agendas, as well as (c) working more specifically with resources, values and assessment (p. 51).

Table 3

Summary of Consultant Competencies

Summarized below are the responses from the 32 consultants, where the competencies of a consultant were clustered as follows:

KNOWLEDGE AREAS

1. Thorough grounding in the behavioral sciences;
2. An equally thorough foundation in the administrative philosophies, policies, and practices of organizational systems and larger social systems;
3. Knowledge of educational and training methodologies, especially laboratory methods, problem-solving exercises, and role playing;
4. An understanding of the stages in the growth of individuals, groups, organizations, and communities and how social systems function at different stages;
5. Knowledge of how to design and help a change process;
6. Knowledge and understanding of human personality, attitude formation, and change;
7. Knowledge of oneself: motivations, strengths, weaknesses, and biases;
8. An understanding of the leading philosophical systems as a framework for thought and a foundation for value system.

SKILL AREAS

1. Communication skills: listening, observing, identifying, and reporting;
2. Teaching and persuasive skills: ability to effectively impart new ideas and insights and to design learning experiences that contribute to growth and change;
3. Counseling skills to help others reach meaningful decisions on their own power;
4. Ability to form relationships based on trust and to work with a great variety of persons of different backgrounds and personalities; sensitivity to the feelings of others; ability to develop and share one's own charisma;
5. Ability to work with groups and teams in planning and implementing change; skill in using group-dynamics techniques and laboratory training methods;
6. Ability to utilize a variety of intervention methods and the ability to determine which intervention is most appropriate at a given time;
7. Skill in designing surveys, interviewing, and other data-collection methods;

(table continues)

8. Ability to diagnose problems with a client, to locate sources of help, power, and influence, to understand a client's values and culture, and to determine readiness for change;
9. Ability to be flexible in dealing with all types of situations;
10. Skill in using problem-solving techniques and in assisting others in problem solving.

ATTITUDE AREAS

1. Attitude of a professional: competence, integrity, feeling of responsibility for helping clients cope with their problems;
2. Maturity: self-confidence, courage to stand by one's views, willingness to take necessary risks, ability to cope with rejection, hostility, and suspicion;
3. Open-mindedness, honesty, intelligence;
4. Possession of a humanistic value system: belief in the importance of the individual; belief in technology and efficiency as means and not ends; trust in people and the democratic process in economic activities.

Such a summary is one step toward identifying competencies.

Lippitt and Lippitt (1978), p. 97

Consultants' competencies and qualities will vary with their perceptions of change and consultancy. One of the more popular approaches is the process where the consultant meets the clients' needs by tailoring suggestions and approaches to the specific circumstances.

Millikan (1979) found that teachers suffered from a "lack of time to seek needed consultative assistance, a lack of access to formally designated external consultative personnel, and difficulty in achieving two-way interaction with the most appropriate in-school personnel." Millikan believed that the value of educational consultation has been both "over-estimated and under-utilized" (p. vi).

Summarized below are Neagley and Evans' (1980) points for and against the use of consultative personnel, who, by designation, have an assigned advisory role:

Advantages:

1. The concept of the completely self-contained classroom is preserved under this plan.
2. Flexible scheduling of the special subject areas is possible because it is completely under the control of the regular classroom teacher.
3. Expert assistance is available on an "on-call" basis at all times.
4. Specialists can use their time and talents economically because they can devote the bulk of their energy to assisting teachers who need the most help.

Disadvantages:

1. Some teachers do not recognize that they need help in the special areas and consequently, do not ask for help.
2. The services of the consultant seldom are used fully. This is particularly true in the early stages of this arrangement.
3. The special areas may be neglected by teachers who do not consider them important and who have no desire to improve in teaching them.
4. Some teachers may monopolize the services of the specialists and thus make them unavailable for other teachers.
5. The specialists are not always available when they are needed; for example, several teachers might require the help of the art consultant at the same time. (p. 114)

The six factors listed in Blocher's (1975) model of consultative effectiveness are sufficiently general that they can be applied to most consultative functions, and are key in the perceptions held by various educators in different circumstances who are in need of consultative assistance. Smyth (1986) believed that "clinical supervision represents a powerful convergence of concern for quality education, concern for the dignity and well being of the teacher, and concern for intellectually and ethically defensible approaches to educational progress" (p. 17), that "if espoused theories are their theories-in-use, they are not likely to search for alternatives to their present teaching patterns" (p. 47). Teachers and supervisors need to go beyond descriptions and interpretations of classroom events, generating alternatives to

situations in a team effort.

In a survey of Alberta principals and teachers, a questionnaire was administered to 255 principals to rank the following personnel in the order that they would like to see them added to their school staffs: (a) teacher interns, (b) master (leader) teachers, (c) consultants/specialists, (d) instructional aides, (e) supervisory aides, and (f) clerical aides (Ratsoy et al., 1976, p. 70). Principals preferred, in order, (a) master (leader) teachers, (b) instructional aides, (c) consultants/specialists, (d) teacher interns and/or clerical aides, and (e) supervisory aides. The teachers, in order of preference, ranked the personnel as (a) clerical aides, (b) instructional aides, (c) supervisory aides, (d) consultants/specialists, (e) teacher interns, and (f) master teachers (Ratsoy et al., p. 71). There is little agreement between the ranking of the two groups.

A survey of 86 Alberta superintendents with responsibilities for 116 of the province's 141 jurisdictions indicated that "one percent or less of all schools were reported as having the following categories: master teachers, team teaching leaders, psychologists, community school directors and AV directors" (Ratsoy et al., 1976, p. 248). "While few teachers collaborated with other teachers and with aides in planning and instructing, two-thirds of teachers desired increased opportunities for collegial assistance" (p. 257). This would indicate that the desire is there to have increased support to improve their effective teaching strategies. The key is administrative support: they play a significant and influential role in the implementation of assistance and utilization of available resources, like the consultant.

Holdaway (1971, pp. 40-41), through research across Canada in the

larger metropolitan cities, was able to formulate some generalizations that would have some degree of applicability across the nation regarding consultative positions and roles.

1. A low percentage of total staff occupied full-time consultative positions;

2. People in full-time or part-time consultative positions cannot meet all of the demands for their services;

3. Some teachers do not perceive a need for consultative help;

4. More consultative help is available to urban teachers than to rural teachers;

5. Beginning teachers frequently do not receive sufficient help with their most serious problems;

6. Consultants should mostly give help to teachers in relation to problems perceived by teachers;

7. Principals usually cannot provide the specialist type of consultative help required by most teachers. They can, however, do much with regard to providing a supportive, facilitating and motivating climate;

8. Department heads should be able to provide consultative help upon request by teachers, but should not occupy line positions; their main functions are communication, consultation and coordination;

9. Teaching staff whose duties include part-time consultation in a cluster of schools are likely to be most successful in their resident schools;

10. Consultative positions are frequently accompanied by a lack of clarity in official role description, which is manifested in uncertainty of alter groups about the consultant's function; and

11. The position of consultant could be an attractive career position for many teachers preferring closer contact with children than is provided in administrative positions: this attraction could be reinforced by increased time allotments and financial return.

In presenting these statements, Holdaway (1971, p. 41) indicated that the intent was to encourage discussion about the function of consultation, to stimulate further thought and study, not to present any absolute findings that would be applicable in all school systems across the province(s).

Summary

The focus of this chapter has been a description of predominant orientations in consulting theory and practice. A comparative overview of five orientations (Cawelti & Reavis, 1980; Tharp, 1975; Goldhammer et al., 1980; Faust, 1975; and Wiles & Bondi, 1986) showed substantial agreement on the view of consulting as an indirect service to a client and the definition of consulting in terms of its relationship to change agents. There were differences in intervention methods, preferred tasks and competencies and evaluation of outcomes, but agreement among the five orientations inferred that the long-term criterion for successful consulting is increased teacher effectiveness. From all these viewpoints the ideal consultative relationship is one of mutual collegiality.

Mistrust has grown between teachers and consultants, often the result of a less than complete understanding of the consultant's role. Describing the role of the consultant is a task which is not easily realized, as can be seen in the varied tasks described by different authors. Goldhammer et al. (1980) saw the consultant's role as

encompassing three basic components--administrative, curricular and instructional--which provides a general framework where the multiple roles can be categorized.

The chapter concluded with a summary of research in consulting over the last 17 years since research into the relevance of consulting for schools has been stressed. A common concern was that intervention strategies used by consultants should be implemented by the teacher and the consultant in a collaborative effort to improve consultant effectiveness and teacher ownership in the changes. The findings of eight recent graduate research studies conducted at the University of Alberta have been summarized because of their focus on re-searching the meaning of consulting and also because they exemplify the most recent thrusts in educational research in consulting.

In conclusion, then, it appears that supervision has been and still is in a period of transition and in search of consensus on theory and practice. There has been renewed interest in supervision because of some dissatisfaction with public education, as well as with the movement toward more accountability to the stakeholders of education. As educational policy has been affected by public relations and our current societal trends, so has the role of the consultant. The need for research to develop new consultation techniques in teacher education which have greater relevance for practitioners is being currently acknowledged in the literature on supervision and consulting.

Conceptual Framework

Research suggests that consultants need to operate within well defined and agreed upon limits in order to perform their duties

successfully. It is this definition and identification of boundaries that seems to be causing some frustration in the field of consultation. As Millikan (1979) stresses, "a clear unambiguous understanding of the consultant's role is fundamentally important if the interaction is to be positive and constructive" (p. 24). The essential reasoning behind this study lies in determining the consultant's role as an effective cog in the helping relationship of consultant and teacher in the educational system. To help teachers solve their concerns, consultants must first deal with the contradictory expectations/perceptions of their role.

In the current study consultants' perceptions were examined concerning their role and function in the educational system. Their philosophy, knowledge and competence, skills, tasks and official job descriptions were researched to determine how these variables contribute to consultants' perceptions of their consultancy role. The perceptions of other educators, administrators, teachers and other consultants were discussed by consultants to determine how they perceive that these perceptions and expectations help mold their role composite.

Chapter III

Research Design

Logic would suggest that the best method of inquiry for any research project can be determined only after one has decided on the kind of information needed to be generated. The purpose of this research was to investigate the role and function of educational consultants as perceived by educational consultants. Guba and Lincoln (1982) and Rist (1977) concurred that the style of research one chooses to employ should be a matter of informed judgement rather than orthodoxy. This was perhaps best illustrated by Guba and Lincoln (1981), who stated that "the choice between paradigms in any inquiry ought to be made on the basis of the best fit between the assumptions and postures of a paradigm and the phenomenon being studied" (p. 56).

It would have been possible to gain some information about the respondents' perceptions concerning their consultancy roles using a quantitative methodology with survey questionnaires or highly structured interviews; however, to come to a deeper understanding of consultants' roles and functions, it was necessary to enter into their world of subjective reality. To ensure the accumulation of information that was accurate and adequate enough to generate grounded theory, it was important to interview the participants and allow responses from their own perspectives. The most appropriate procedure for the phenomenon being investigated in this study encompassed the naturalistic research

paradigm, employing qualitative methodology with phenomenological and symbolic interactionist perspectives.

The Naturalistic Paradigm

Within the naturalistic paradigm, data are viewed as emerging from the interaction between the researcher and the data sources. This paradigm is driven by theory grounded in the data, where "the naturalist does not search for data that fits his or her theory but develops a theory to explain the data" (Guba & Lincoln, 1982, p. 235). Five axioms differentiate the naturalistic paradigm from the rationalistic paradigm: (a) there are multiple divergent realities which can only be studied holistically, where each inquiry raises more questions than it appears to answer; (b) the researcher and the participant interact and thus directly and indirectly influence one another; special safeguards must be taken to reduce this influence; (c) generalizations in this paradigm are impossible since phenomena are neither time nor context free (although some transferability may be possible); (d) cause-and-effect relationships are hard to define; at best, plausible inferences can only be suggested; and (e) inquiry is always value bound in at least four ways: researcher's values, paradigm chosen, choice of methods used to guide the collection and analysis of data and values inherent in the context (Guba & Lincoln, 1982, pp. 237-238).

The nature of reality in the naturalistic paradigm is not based on tangible reality, but the meanings and interpretations people ascribe to or make of their reality. Filstead (cited in Guba & Lincoln, 1982) suggested that "there are multiple realities. . . . Individuals are conceptualized as active agents in constructing and making sense of the

realities they encounter" (p. 239). Since realities are multiple, it is futile to expect to develop generalizations; differences and similarities in times or contexts, as well as contingencies and disjunctions, must all be taken into account to make judgements about transferability.

Educational researchers have traditionally detached themselves from the substantive issue of their studies. The naturalistic paradigm, however, is grounded in a situational/interpretive orientation in which the researcher is an active participant whose values and actions change the nature of the research experience. Values cannot be set aside, controlled or eliminated; it is more reasonable to acknowledge and make explicit the biases, understandings, beliefs, assumptions, presuppositions and theories than to try to compensate or forget them. Guba and Lincoln (1982) assert that "naturalists presuppose that inquiry is inevitably grounded in the value systems that characterize the inquirer, the respondent, the paradigm chosen, the methods selected, and the social and conceptual contexts" (p. 242). Although values cannot be eliminated, safeguards to ground the inquiry can be used to expose and explicate the values whenever possible.

Guba and Lincoln (1981, 1982) proposed four terms to be used to judge the trustworthiness of findings that emerge from naturalistic research. Listed and defined below are the four terms identified by Guba and Lincoln (1982, p. 246):

1. Credibility: Do the data sources find the inquirer's analysis, formulation, and interpretations to be credible/believable? Naturalists ask whether the realities of the participants have been represented appropriately.

2. Transferability: Is enough of a "thick description" available to facilitate judgements about the extent to which working hypotheses from that context might be transferable to a second and similar context?
3. Dependability: The naturalist anticipates that the design of the study will emerge as the inquiry proceeds, which prevents a replication of a study. Dependability to a naturalist means stability of the study.
4. Confirmability/Credibility: To safeguard against loss of credibility, the following were suggested: (a) prolonged engagement at a site, (b) persistent observation, (c) peer debriefing, (d) triangulation, (e) referential materials (e.g., documents, films, videotapes), and (f) member checks.

Goetz and LeCompte (cited in Guba & Lincoln, 1985) suggested that inductive analysis which "begins not with theories or hypotheses but with the data themselves, from which theoretical categories and relational propositions may be arrived at by inductive reasoning processes (p. 333) provides an excellent match for the rationale of the naturalistic paradigm.

Phenomenological Perspective

The philosophy behind the phenomenological perspective holds that there are multiple ways by which humans interpret their experiences depending upon their social interactions, and it is the subjective meaning of these experiences that constitutes reality (Bogdan & Biklen, 1982, p. 32; Wilson, 1977, p. 249; van Manen, 1984, p. 55). The point of phenomenological research is to

> "borrow" other people's experiences and their reflections on their experiences in order to better be able to come to an understanding of the deeper meaning or significance of an aspect of human experience, in the context of the whole of human experience. (van Manen, 1984, p. 55)

A phenomenological description is only one interpretation, and "no single interpretation of human experience will ever exhaust the possibility of yet another complementary, or even potentially richer, description" (p. 40). The task, then, of phenomenological research and writing is to construct a possible interpretation of the nature of a certain human experience.

Understanding the meaning respondents attach to events and interactions in given situations is termed "subjective understanding" or verstehen. Verstehen has been translated as an interpretive understanding of another's subjective state of mind (Bogdan & Biklen, 1982, p. 31; Abrahamson, 1983, p. 250; Rist, 1977, p. 44; Guba & Lincoln, 1982, pp. 237-238). Wilson (1977) concluded that it is not enough to know merely that feelings, thoughts or actions exist; rather, it is necessary also to know the framework in which these behaviors occur (p. 250). According to van Manen (1984), all understanding in phenomenological research is "ultimately self-understanding" (p. 50). From the phenomenological point of view, the research process of the study further advances the educational development of the researcher, who finds ways to develop deeper understandings of the phenomenon being studied.

Symbolic Interaction

Entwined within the phenomenological perspective and basic to naturalistic inquiry is the concept of symbolic interaction. Symbolic

interactionists assume that humans act toward things on the basis of the meanings those objects have for them. The symbolic interactionist is interested in understanding how these interpretations are developed and used by individuals in specific situations. Meanings are seen as social products arising through social interaction with others. Blumer (1969) reinforced this by stating that "the meaning of a thing for a person grows out of the ways in which other persons act toward the person with regard to the thing" (p. 27).

Meltzer (1972) believed that "behavior is caused by a reflective and socially derived interpretation of the internal and external stimuli that are present" (p. 2). Symbolic interactionists, then, view the individual and society as inseparable units; both influence the other. Meltzer also stressed that norms, status positions and role relationships are the frameworks within which social action takes place, not the determinants of action. Symbolic interactionists are concerned with participants' points of view, wanting to understand the process by which the points of view develop, viewing

> the given sphere of life under study as a moving process in which the participants are defining and interpreting each other's acts . . . it is important to see how this process of designation and interpretation is sustaining, undercutting, redirecting, and transforming the ways in which the participants are fitting together their lines of action. (Blumer, 1969, p. 53)

Because individual and social interaction is such a crucial link, symbolic interactionists are interested in understanding how individuals are able to take one another's perspectives and learn meanings and symbols in concrete instances of interaction (Denzin, 1978, p. 7; Ritzer, 1983, p. 308; Jacob, 1987, p. 29).

Symbolic interactionists believe that to truly document the

processes of symbolic interaction, researchers need to get "inside the experience of the actor" (Jacob, 1987, p. 30). They also believe that individuals who occupy a particular position in the social structure develop common frameworks and patterns of behavior. Cultural standards and the interpretations of these standards, along with the participants' goals and perceptions, must be understood in order to comprehend the ensuing behavior in various situations. Generally, symbolic interactionists focus on a group of individuals who share the same position in the organization, and look at the subjective perceptions and behavior patterns that the group's members develop to adapt to their position. Bogdan and Biklen (1982) concurred that "human experience is mediated by interpretation. . . . objects, events, people and situations do not possess their own meaning; rather, meaning is conferred upon them" (p. 33).

Interviewing

In a practical thrust, interviews with consultants during a pilot study and the research study are described in an attempt to engage in a deeper and fuller understanding of the subjective reality of the consultants under study. The basic source of research data lies in human interaction and is only obtainable through participation in the process. In congruence with Guba and Lincoln (1982, p. 245), the current study occurred in a natural setting of the consultant's choice.

The interviewer's major task is to impel the participants to freely express their thoughts about the topic central to the research study (Bogdan & Biklen, 1982, p. 2; Guba & Lincoln, 1981, p. 157). These interviews produce rich data, but in order to achieve such results, a

climate of openness and trust must be established between the researcher and the respondent. Weber (1985) corroborated this by emphasizing the fact that the interview involves risks for both parties. "On one hand, we run the risk of revealing that which we do not want to reveal. On the other hand, we also run the more welcome risk of gaining valuable insight into whatever it is that we discuss" (p. 66). In the interest of ethics, the purpose of the research and the content of the interview must be explained to the prospective participants.

Guba and Lincoln (1981) suggested that a good naturalistic inquirer should be sensitive, open to a wide variety of stimuli and completely aware that the variety exists, a problem finder and a pattern creator, a constructor of realities, trustworthy, able to engage in bias-free observation, and patient and self-controlled enough to listen rather than intervene (p. 147). The purpose of the interview is to find out what is on the participants' minds, not to put ideas into their minds; as a result, researchers must restrain their natural tendencies to interrupt, to contribute their own opinions and to disagree or agree. The researcher, however, is not detached from the interview experience; should this occur, the interview may sometimes be perceived as a process to reveal what participants may not want revealed.

Weber (1985) indicated that interviews can be very rich experiences if the researcher is able to use probing questions effectively; the interview then becomes a shared experience.

> The interview has its best moments when the interviewer and the participant are both caught up in the phenomenon being discussed, when both are trying and wanting to understand. At these times, both people forget the tape-recorder, forget that "this is an interview," and simply talk and listen in a genuine dialogue that is focussed on the phenomenon in question. They are talking to each other rather than past each other. (p. 69)

Validation

Validation is a key issue for any researcher working in the interpretive paradigm. Particularly in a study with a phenomenological orientation, there is always the possibility of a discrepancy between what participants say and what they mean. The researcher is concerned with verifying the descriptions according to whether the results of the inquiry are accurate and true to the understanding of other members of the group under study in the everyday world. Verification is achieved in terms of the meanings shared by the participants, where

> the transcript themes that have been identified by the researcher may be reflected on in more dialogic conversations where both the researcher and the interviewee collaborate in the attempt to interpret the significance of the preliminary themes in the light of the original phenomenological question. (van Manen, 1984, p. 63)

As well, in addition to encouraging the participant to talk in a free and relaxed manner, occasional paraphrasing during and after the interview has concluded is essential for clarification purposes and perception checks. The interviewer should use phrases such as: "uh-huh," "yes" and "interesting," and body language such as the nod of the head, facial expressions and hand motions to encourage free and relaxed responses. The researcher must refrain from showing any bias which may alter the participant's perspective. The interviewer must be prepared to accommodate periods of silence without contributing or urging.

As Weber (1985) pointed out, verbatim transcription does not accommodate for tone of voice and emphasis, nor for the differences in style, words and form that exist between oral and written modes of communication (p. 71). The author suggested that "tape recordings combined with written transcripts and notes should be considered the data

of preference for analysis" (p. 71). This would support Guba and Lincoln's (1982) theory of triangulation, "whereby a variety of data sources, different perspectives or theories, and/or different methods are pitted against one another to cross-check data and interpretation" (p. 247).

Choice of Research Instruments for the Study

To come to a deeper understanding of the phenomenon under study, it was necessary to employ the qualitative methodology, using a questionnaire and interviews to obtain data. The purpose of the questionnaire was to gather demographic information on each consultant prior to the interviews, as well as to facilitate the interview process (see Appendix A).

In-depth interviewing was employed for the researcher to enter into the subjective reality of the consultants, to help clarify as well as expand on the role and function of consultants. Each interview was tape-recorded, with the permission of the interviewee, and later transcribed. A verbatim transcription of the interview was returned to each participant for their feedback on clarity of responses; as well, this provided the consultants with an opportunity to delete or make additions to their original responses.

The objective of the interview was to obtain information which would provide a better understanding of the views and concerns that consultants have regarding their positions. The researcher was able to accomplish this objective by reviewing with the participants their questionnaire responses, followed by an in-depth interview. The interview process entailed discussions on the consultants' mandated and perceived roles,

the process they follow when working with a teacher, and evaluation methods (their own and their supervisors'). Among other topics touched on during the interview, one concerned the consultants' perceptions of their clients' expectations of the consultancy role and function in the educational system.

Data Collection Procedures

Permission was obtained from the Superintendent of the school district to introduce the study and distribute the questionnaire to all district consultants during the first week of February, 1988. The researcher contacted the prospective participants by telephone to explain the study, give an overview of the interview, and to arrange a schedule of interview times that would be convenient to the participants. The interviews were conducted at the district office during the last week of February, after the questionnaires had been collected. The interviews were scheduled for 60 minutes, but the length varied from 40 minutes to 90 minutes.

The researcher was cognizant of Bogdan and Biklen's (1982) advice that the interviewer should avoid questions that could be answered "yes" or "no" while guiding the interview's course. Particulars and details came from probing questions when respondents' answers were vague or required an explanation to clarify the respondents' meaning. However, the researcher had to remember that this guiding must not threaten the natural responses of the participants, so the participants were encouraged to talk freely and express their views on the subject matter under discussion. Bogdan and Biklen stressed that

> if at first you do not understand what the respondent is getting at, ask for clarification. Question, not to challenge, but to make clear. If you cannot understand, assume that you are at fault. Assume the problem is not that the subject does not make sense, but that you have not been able to comprehend (p. 137).

This open-ended approach resulted in a significant number of leads and clues regarding a variety of tasks that consultants perform.

Permission was secured from each respondent to tape-record the interviews. Assurances were given that any private information would remain confidential, names would not be attached to any information, and that the general purpose of the collected data was to generate a deeper understanding of their role and function.

The type of interview administered to the participants was semi-structured. Although the interviewees were allowed to pursue related topics and "shape" the content of each interview, a general interview guide was developed listing the categories or themes (background/training, information, paper job description, perceptions, evaluation, and issues/concerns) the researcher intended to cover and was used to ensure that they were addressed. Whyte (1982) concluded that "there may be occasions where a respondent may meander beyond the boundaries of the study; some gentle redirection is necessary, but this should be done carefully so as not to crush the respondent's enthusiasm" (p. 111). During the interview the researcher recorded key phrases and words of the respondent which, at the end of the interview, provided a verbal summary of the interviewee's main points. This technique also helped to confirm the interviewer's understanding and thereby enhance the credibility and dependability of the findings.

The tapes were transcribed verbatim and sent to each participant,

prefaced with a personal letter indicating some of the descriptions which the researcher found particularly illuminating and insightful. Each participant was asked to proofread the transcript to make any changes by way of elaboration, qualification and deletion. Each participant responded, making some alterations by way of clarification, as well as some deletions. In order to triangulate the researcher's findings and perceptions, each participant was contacted by telephone to verify the researcher's interpretation of the data once it was analyzed.

Pilot Study

As was indicated earlier, a growing number of persons in our society are being labeled consultants because of their helping relationship. It is this relationship where consultants interact with others that enables consultants to provide continuous professional development of educators in our profession. In order for the researcher to develop a better understanding of consultants in their unique positions prior to conducting the actual research study, it was imperative that a pilot study be conducted to guard against researcher bias and design flaws. Borg and Gall (1983) emphasized that

> after the interview guide has been developed, a pilot study should be conducted to evaluate and improve the guide and the interview procedure and help the interviewer develop experience in using the procedure before any research data for the main study are collected. (p. 454).

The authors also cautioned that the interviewer should determine from the pilot study (a) whether the planned procedures actually produced the data desired, (b) if there were any communication problems, evidence of inadequate motivation, or other clues that would suggest a rephrasing of questions or revision of procedure, (c) if there were any threatening

questions for the participants, if any questions should be omitted or revised, and (d) if the method chosen to record the interview data is appropriate (pp. 454-455).

In the social/behavioral sciences there are multiple realities and the meanings and interpretations that individuals ascribe to these realities mediate their behavior. It is important, then, that a researcher explore a variety of perspectives to try to understand and develop a sufficient "thick description." Guba and Lincoln (1982) demonstrated this by alluding to the fact that every inquiry raises more questions than it answers, where

> the more individuals one encounters, [the more] inquiry diverges as a result. Knowledge cannot be represented as a "map" of territory to be explored and finally to be fully understood; knowledge is rather like a sphere in space, which represents the unknown. As the sphere is enlarged (i.e., more knowledge is gained), one simultaneously comes in contact with new unknowns that were not appreciated before. (p. 239)

Three consultants in a large urban area agreed to participate in the pilot study in an attempt to identify their attitudes and beliefs concerning their consultancy role in the educational system. Arrangements for the interviews were made one week in advance; at this time the participants were informed about the nature of the study and a general outline of the topics to be covered was discussed. The interviewees then had an opportunity to prepare for the interview, with the assurance that any private information given to the researcher would remain confidential, and pseudonyms would be used to mask their identities.

The range of information shared with the researcher during the 60-minute interviews suggested that the interviewees felt at ease during the interview. A general interview guide was developed listing the

categories the researcher intended to cover during the interview to ensure that the topics were covered. This same guide, with some alterations, was used during the actual research study. All interviews were tape-recorded and transcribed for ease of analysis. Paper job descriptions were also obtained from the consultants to help triangulate the researcher's findings.

Summary

This chapter was a description of and rationale for the method of inquiry chosen for this particular research study. An overview of the naturalistic paradigm was presented in an attempt to reinforce the researcher's choice of paradigm based on the assumptions and postures of the naturalistic paradigm and the phenomenon being studied. The nature of reality in the naturalistic paradigm is based on the meanings and interpretations people ascribe to their subjective reality, and therefore grounded the value systems of the respondent and the researcher as an active participant. For this reason it was necessary to employ phenomenological and symbolic interactionist research perspectives.

The philosophy underlying the phenomenological perspective was outlined in conjunction with how the research process ultimately affects the researcher. Phenomenological researchers hold that there are multiple ways in which humans can interpret their experiences depending on a number of internal and external factors. Closely linked with the phenomenological perspective is the concept of symbolic interaction. The symbolic interactionists believe that humans react to social cues around them. As a result they are interested in understanding how humans develop their interpretations of these social cues.

A comparative overview of the nature of interviewing was also discussed. From the viewpoints presented, the ideal interview should become a shared experience where both the researcher and the participant develop new insights. The significance of validating and triangulating the researcher's interpretation of the results was presented because of its importance for researchers working in the interpretive paradigm. Finally, the choice of research instruments and data collection procedures for the study were discussed, along with the rationale for conducting a pilot study, in an attempt to place the study in context within the naturalistic paradigm.

As the thesis developed from the initial proposal stage, the researcher's perspective changed, resulting in further thesis changes. The purpose of this study was to gain an insight into and an understanding of the roles and functions of consultants. Being a qualitative study encompassing the naturalistic paradigm with phenomenological and social interactionist perspectives, it was not designed to test or verify hypotheses, but rather to seek meanings grounded in real-life situations from which they were derived. Naturalistic inquiry "is driven by theory grounded in the data; the naturalist does not search for data that fit his or her theory but develops a theory to explain the data" (Guba & Lincoln, 1982, p. 235).

Delimitations of the Study

This study was confined to those persons formally designated as consultants of a single school board who were willing to participate in the study.

Limitations of the Study

Since information was limited to such a small group, the meanings developed can be applied only to the personnel involved in the study. The findings were not intended to be representative of all consultants. The time period during which the data was collected may also influence the types of responses and comments made by the consultants.

Assumptions of the Study

It was assumed that the information give by the respondents was accurate and valid, that the format used covered all major areas of concern for practicing consultants, and that data collection and analysis technique used accurately reflected the perceptions indicated by the consultants.

Chapter 4

Central Office Consultative Personnel's Expectations of and Experiences in a Consultancy Role

By its very nature, the essence of the consultatory function is one of giving assistance to others. The attitudes and perceptions of the helper and the perceptions and expectations of the person being assisted are key elements in any helping relationship. All helping relationships are essentially learning situations for both parties involved, depending on the degree to which the helper can create relationships which facilitate the growth of others as separate and not dependent persons. Thus, the context in which the working relationship between a consultant and teacher exists is important in that it affects the extent to which the consultant is able to effect decisive changes in teacher behavior.

Training/Background Information

The respondents interviewed varied in both their educational background and teaching experiences. Bob studied at the University of Wales, graduating with a teaching diploma and a diploma in physical education. He taught in England for three years, Jamaica for six years and Alberta for six years. While teaching in Alberta he attended summer courses and graduated with a B.P.H.E. He is also an experienced high school principal, during which time he studied for a Masters of Science degree in Oregon. He has been a consultant for Alberta Education for seven years; during his first year as a consultant he finished the course

work for a diploma in Educational Administration.

Anne was a full-time teacher for twelve years before becoming a facilitator in her subject area for a large Catholic school board. She held this position for three years before being appointed as a full-time consultant. This is her first year in this position. Carol, a consultant for a large public school district, has ten years' experience as a high school teacher and has held her present position as a consultant for three years.

When the position for a consultant for Alberta Education was advertised, the successful candidate had to have a postgraduate degree, an extensive background in the advertised subject area, teaching experience from the primary to the secondary level, and administrative experience. The Catholic school district required its consultants to hold a valid Alberta Teaching Certificate and be individuals who had one year post-graduate work in their area of specialization; possessed a broad knowledge of current educational theory and practice; had been identified as master teachers who were knowledgeable and could demonstrate sound instructional practice, experience, and expertise in their area of specialization; had a capacity for organization and leadership; and be an advocate of Catholic Education. The term of appointment was usually for two years or as specified by the Chief Superintendent.

The public school district stressed the individuals' past "track record," that they had a valid Alberta Teaching Certificate, and that they were master classroom teachers who were knowledgeable and could demonstrate sound instructional practice. It was assumed that their consultants had leadership abilities and were self-initiators who could

work cooperatively with others and motivate teachers to initiate and carry through with proposed projects (as indicated by Carol).

None of the consultants interviewed received any type of formal in-service training for their particular job. All three consultants did indicate that another experienced consultant acted as a mentor and friend who initiated them into the new position and offered support when needed throughout that first year (and subsequent years).

Perceptions

The consultants' perceptions of their roles have changed with experience; one had indicated that "I've gotten more depth, see the meaning behind what I'm doing now. I give richer experiences to the teachers as a result." As was indicated by Lippitt and Lippitt (p. 22), the consultants felt that they were there to assist or help teachers.

> I do a lot of reaffirming, add finishing touches, demonstrate lessons, hold conferences and act as a facilitator.

Initially, teachers were reported as being apprehensive about consultants coming into their "domain," but, as one consultant indicated:

> Once they learn that my role is not to evaluate, trust me and see that I'm going to come into the class and be positive, non-judgemental, they see me as someone who can give feedback, someone who can offer assistance, advice and support.

The consultants reported that school administration was generally supportive and cooperative of their efforts, and saw them as a resource to be used to enhance the development of their staff.

> They see what we do as a very helpful part of staff development. The bottom line is if they see us as being helpful, their teachers are saying, yes, we really like this program. . . . Whether administration knows a lot about it, they support it.

> For the most part they see our role as one that is helpful for the teacher, and that comes from teachers themselves, or they see it as a needed effective way of implementing a staff development program.

Central/regional office personnel were also reported as being very supportive of their consultants.

> Some people are envious of our position. . . . We are a group of people with greatly varied backgrounds, all very creative, knowledgeable and bright people who like each other and we have a lot of fun; we support each other and because we are a team of people who work together and have that support base, we really enjoy what we are doing, and we work with teachers, which is very satisfying. Our job is very people oriented. They also know that we work hard: we're out of the office a lot working with teachers and on the phone a lot when we're in the office.

The desirable characteristics that a consultant should possess, as identified by the consultants interviewed in the pilot study, are listed below:

1. Have a strong background knowledge in the area of expertise, be a master teacher;
2. Be able to communicate, be understanding, warm and have a rapport with teachers, so that they know that the consultant cares and is there for the teacher's benefit and assistance;
3. Be understanding of what the teacher is going through, being aware of their work load;
4. Assist teachers, and not add to the stresses that they already have;
5. Be honest and sincere;
6. Have a really good sense of yourself, so you can give to others;
7. Be flexible;
8. Love people, reaffirm them, giving "verbal hugs"; and
9. Be a catalyst.

Many of these characteristics also support the characteristics listed by Goldhammer et al. (1980), Tharp (1975), Matthews (1983), Wiles and Bondi (1986), and English and Steffy (1983) in the review of the literature.

Role/Function

Bob's mandate was to improve the quality of education in Alberta schools in accordance with the goals, policies, statutes and regulations of Alberta Education through the provision of the following services: implementation, monitoring, evaluation, accreditation, investigation, financial management, public inquiry and support. These seven areas are known as KRAs, or key responsibility areas. Bob indicated that "numerous telephone requests over a broad range of topics" engaged most of his office time. Other areas included work for the Minister, meetings (both office and zone), writing and editing reports, initiating new members into the office, as well as devoting time to his KRAs in the jurisdictions he had been assigned.

> Most evenings/weekends are used to catch up on reading mail, catch up on reading new documents and there's no time in the day--it's not a sob story, it's just a fact. I can be doing one thing and the telephone rings and immediately I'm into a totally different field.

Anne's mandate was to spend the major portion of her time working directly with teachers in assisting them with their ongoing instructional programs. The consultant's work tends to be centered at the school and classroom level.

> Our system fairly well allows the individual according to your personality what you'd like to do.

She indicated that over 90% of her time was spent working with teachers. One quarter of this time was spent initiating workshops,

making phone contacts, organizing conferences for teachers, and identifying professional development conferences for teachers. The remainder of the time was spent working directly with teachers as she saw fit.

> My boss laid out some expectations, though, on the other hand. I like the freedom I have. I put my own personality into things, I can be creative. I don't have to follow structured rules hard and fast; the sky's the limit really. We help teachers the best way we can; your own imagination and your budget are your only restrictions! I feel quite 'grown-up' and quite credible with this freedom.

Apart from being in the schools, much of her office time was spent on the phone or mailing material out to teachers.

> I have a problem where I have a ton of requests when I get back to the office when I've been in the schools, and sometimes get people saying, "Oh, sure, you're not there to help me," and when I'm here people will call and say, "You're just sitting there doing what?" . . . I'm a consultant, but I'm also a gopher too. There are some days that all I do is run things off and mail them out. I feel like, "What have you done today?"
>
> The stress of it doesn't really allow you to REALLY enjoy it, plus things go by so fast that you don't really have a lot of time to absorb the experience you are having.

Carol's role was defined as a "collaborative process that led to the attainment of mutually shared objectives." The selection of the process rested ultimately with the participant responsible for the results. The consultant's role in this school district involved leadership, advocacy, and assistance. Much of Carol's time was spent in a proactive role, setting up programs for the professional development of teachers, while some time was spent in a reactive role when dealing with a teacher "in crisis."

Evaluation

All of the consultants indicated that they were actively involved in their evaluations. They were responsible for writing reports on their activities to submit to their supervisors. This gave their respective supervisors a guide to use in the evaluation process.

Anne We have to write a year-end report, summarizing the highlights of the past year and indicating what our objectives are for the fall. They don't want it longer than two pages. There is a standard form that is used to evaluate us. Most of the questions are open ended and the supervisor just completes the statement. It's self-evaluation for the most part and your peers . . . . It's supportive, but also helps keep you on the straight and narrow.

Bob I have a conference at the beginning of the year with my director to see if my plans are feasible, if I can get through all of my proposed work. But, having made the plan, it can change drastically, ex. if an issue (Bill 59) arises, the plan is flexible. There is also a mid-point conference, and an end-of-year conference where we are rated on a five-point scale. Three is standard, where you are doing the work you are expected to do; one and two are not good reports.

Carol I evaluate myself on whether teachers are broadening their perspectives, growth on the teachers' part . . . and the feeling of wellness on the teachers' behalf--for them to say "I feel so much better about going into the classroom now than I did in September." As well we receive a performance review by our supervisor. We sit down, one to one, and I establish a professional growth plan, things I would like to achieve, how I intend to do it, indicators that I have achieved this, and a timeline. We discuss it. He would also attend one of my sessions.

Issues/Concerns

The following is a list of issues/concerns that were generated by the three consultants in the interviews, which are consolidated below:

1. A lack of in-service programs for new consultants;

2. Time--"not enough to do a really good job with teachers, worry

about the impression I've left," "a lot more is being done that would fit a 'normal,' what is considered a normal working day";

3. Flexibility--"must be very flexible, spend time where the demand is, plans change";

4. Would like to see more teacher sharing of ideas/strategies;

5. Time to replenish, give up weekends/evenings to catch up on reading to keep current. "If you don't grow that way you begin to fall behind--I must hurry and catch up, for I am their leader; I hope that never happens";

6. Some administrators ask for confidential information to complete a teacher's evaluation;

7. Band-aid treatments to teacher-in-crisis problems, "treating the symptoms only"; and

8. The professional development of teachers should not be an add-on for them: "They don't get paid or given time during their working day BUT they are expected to change with the times."

Official Paper Job Descriptions

During the pilot study, the Catholic school board was reviewing the roles of their consultants and supervisors because the individuals in these positions were both engaged in the same nature and level of work. The job description for supervisors read, "The incumbents are expected to spend major portions of their time visiting the schools in order to provide assistance to teachers. Supervisors are on a ten-month basis in a staff position but will assume some administrative responsibilities," whereas, in the 1988 draft proposal, supervisors:

> are expected to spend a major portion of their time in monitoring, implementing and evaluating programs. While supervisors spend a portion of their time working at the school and classroom level, their duties require that a significant portion of the time be spent at the district level in the management of Alberta Education and District programs and services.

Presently, consultants in this same system "work in a staff position on a ten-month basis. The primary role is working with teaching staff in the improvement of instruction in the field of specialization. Appointments are on a two-year-term basis" (see Appendix B). In the 1988 draft proposal, consultants are "expected to spend the major portion of their time working directly with teachers in assisting them with their ongoing instructional programs. The consultant's work tends to be centered at the school and classroom level" (see Appendix C). With the proposed changes in role descriptions for consultants and supervisors, the ambiguity and overlap of expected functions is dissipated to some extent. The consultants and supervisors in this Catholic school district are involved in negotiations of their new job description.

The consulting service's priorities in the public school district in 1988 are to (a) assist in the enhancement of the quality of student programming, and (b) improve the nature and delivery of consulting services (Edmonton Public School Board, 1988). This public school district (1988) has defined their consulting services under the following headings: (a) purpose statement, (b) definition of consulting, (c) principles of consulting, (d) the consultant's role, and (e) the consultant's function (see Appendix D). In addition to this, a <u>Directory of Consulting Services</u> for this public school district was published for the 1987-88 school year. The directory includes (a) emergency phone numbers, (b) an introduction to the services, (c) consulting services

division priorities, (d) student services priorities, (e) instruction services priorities, (f) consulting services organizational chart, (g) a listing of student and instruction services, and (h) a listing of all consulting services staff. The consulting branch of this public school district appears to be very well organized.

"The Role of the Consultant for Alberta Education" read "to improve the quality of education in Alberta schools in accordance with the goals, policies, statutes, and regulations of Alberta Education through the provision of the following services: implementation, monitoring, evaluation, accreditation, investigation, financial management, public inquiry and support" (see Appendix E). The services listed were known as the consultant's KRAs or key responsibility areas. The consultants were expected to spend a portion of their time in each one of these areas.

One key difference between the Catholic and the public school boards concerns their perception of consultants and evaluation. Under no circumstances are the consultants for the public school board expected to perform formal teacher evaluations: The consultant is expected to monitor and "evaluate" a participant's <u>progress</u> while the consultant is working with that individual. The consultants for the Catholic school district, however, are expected to "assist line officers in carrying out their responsibilities in the evaluation of certified staff in accordance with school system practice" (see Appendix C). The consultants then assume a helping relationship and an evaluative relationship with their clients, which they feel is a contradiction in roles. Bob also found himself in this position of assistance and evaluation because of his mandated role.

The Catholic school district has listed eight areas that are

considered to be "desirable qualifications" for potential consultant candidates (see Appendix C). Whereas, the public school board stresses the individual's past "track record," such as holding a valid Alberta Teaching Certificate and being identified as a master classroom teacher who was knowledgeable and could demonstrate sound instructional practice; it was assumed that their consultants had leadership abilities, were self-initiators who could work cooperatively with others, motivate teachers to initiate and carry through with proposed projects, be empathetic with teachers, and be able to adapt and be flexible in their position. (None of this is in writing, however.) Similarly, Alberta Education does not have in writing the "desirable qualifications" that were deemed necessary for its consultants. When a position was advertised it was suggested that a candidate have completed postgraduate work, have an extensive background in the subject area being applied for, have teaching experience from primary to secondary education, and have some administrative experience.

None of the consultants interviewed indicated that they received any type of formal in-service training or orientation when they entered their respective positions. Generally, another experienced consultant acted as a mentor and friend, initiating new consultants into their new positions, offering support and guidance when needed throughout the first year.

In the public school district consultants are evaluated every year. The evaluation process is improvement oriented, based on goals set by the consultant and supervisor observations, but the evaluation process differs from supervisor to supervisor. There are six consulting teams in the district: Teams A, B, and C (Instruction Services Branch), and Teams N, W, and E (Student Services Branch) (see Appendix F). At the beginning

of the year the consultants meet with their respective supervisors and establish individual professional growth plans. These plans consist of their personal growth objectives as well as program objectives; with these they establish a timeline and indicators of how these goals will be achieved. This is established at the beginning of the school year. Two or three times during the year the supervisor and the consultant will review the consultant's progress according to the established goals. The program objectives set by the consultant must also harmonize with those established by the district (see Appendices G and H), as well as their specific consulting branch. Supervisors try to spend time with each of their consultants in the field, "to get a first-hand impression of the consultant which enables them to match appropriately consultants with teachers who are in need of assistance." Carol also indicated that "we talk about my plans, the growth of my professional development, my career, and program objectives, and he [the supervisor] may attend one of my sessions. But if I don't like this evaluation format I can request to have it done in another way. He's pretty flexible."

The Catholic school district consultants are evaluated using a standard form (see Appendix I) in conjunction with an interview with their supervisor. The consultants have to write a year-end report, not exceeding two pages, summarizing the highlights of the year and indicating their objectives for the following year. The goals set by the consultants must align with board policy and priorities for the upcoming school year. Anne stressed that her "supervisor gives them [the consultants] a tremendous amount of credibility. He believes we know what we are doing, doesn't question. He says, 'You guys have a job, you go and do it, I'm just here to be a catalyst.' So I feel very supported

in every way possible and very 'grown up.'"

The consultants for Alberta Education submit their plans to their supervisor. Together, the consultant and supervisor "review the plans, have yearly meetings and interviews, look at the results achieved, and look at field feedback [written and oral]." The consultants generally participate in three formal conferences with their supervisor during the year. The purpose of the conference at the beginning of the year was to determine if the proposed plans of the consultant were feasible. The mid-point conference primarily enabled the supervisor to "touch base" with the consultant to determine how the consultant was progressing. During the end-of-year conference, the consultants were rated on a five-point scale. The supervisor wrote the initial appraisal report, which was then submitted to the Director, who either accepted or changed the report. The Director of the office supervised the support staff and the consultants.

Summary

Although this was a relatively small sample, some implications can be drawn from these findings. It appeared that the services offered by consultants were fully supported by senior administration, principals and teachers in the consultants' respective divisions (Alberta Education and the public and Catholic school boards). The three consultants felt that they provided reinforcement, instruction, modeling, feedback and cognitive restructuring for their clients. The consultants saw themselves as helpers and facilitators, assuming an assistance role in helping teachers.

The consultants indicated that they were chosen for their respective

positions because they were identified as "master teachers" in their areas of specialization. These consultants strongly believed that in order to promote the improvement of teaching and the curriculum, honest, open and supportive interaction must take place. The consultants reported that they do play a number of different roles during the course of their day or even in their dealings with teachers, depending on the type of assistance required.

The consultants' creativity as classroom teachers was seen as a desirable characteristic, so the freedom to be creative and imaginative in their approach and programs was appreciated. The definition and identification of roles caused some frustration among the consultants and supervisors in the Catholic school district. As a result, the consultants, supervisors and area superintendents were reviewing the job descriptions of both the consultant and supervisor to clearly identify their respective roles in the system. Millikan (1979) stressed in 1979 that "a clear unambiguous understanding of the consultant's role is fundamentally important if the interaction is to be positive and constructive" (p. 24). Millikan identified a need to differentiate between the role functions of the supervisor and those of the consultant because of conflicting perceptions held by clients and the incumbents. Finally, in 1988 this Catholic school board was reviewing these role descriptions.

Client services commonly mentioned by the consultants were to provide assistance to teachers and administrators, to help obtain instructional materials, to give demonstration lessons, to arrange for intervisitations of teachers, and to provide workshops to expand teachers' professional development. The interpersonal relationship

between consultants and clients must enable the two to give and receive information, where both examine all potential solutions and alternatives and select the best approach based on the needs of the client. The characteristics that the consultants generated during the interviews also support English and Steffy's (1984) list of skills suggested for effective consultants.

The consultants all felt that their main function was to assist teachers (educators), thereby placing a great deal of importance on their helping relationship. The consultants stressed that, given the right learning climate, teachers experienced increased self-confidence and self-actualization, improved classroom teaching, broadened personal perspectives, and positive personal and professional contact with other educators. The three consultants interviewed felt that their experience as classroom teachers strengthened their credibility, where other teachers saw them as coaches or mentors who demonstrated advanced skills while teaching, which enabled them to share their expertise and experiences with other teachers in a consultancy position.

The paper job description was used as a guide by the three consultants, but for the major portion of their time the consultants reported that their clients dictated where the percentage of their time would be spent. Bob indicated that he had very little time during his day to read his mail and complete his paper work, so quite often he found himself taking this work home with him and finishing it in the evening or on the weekends. "I can be doing one thing and the telephone rings and immediately I'm into a totally different field." Bob also stressed that "numerous telephone requests over a broad range of topics" engaged most of his office time. Anne explained that although she was a consultant,

she was also a "gopher." "There are some days that all I do is run things off and mail them out. I feel like, 'What have you done today?'" The mandate for these consultants is to improve the quality of education in Alberta schools by working directly with teachers/educators, assisting them with their ongoing instructional programs.

Methodology Revisions

As the thesis developed from the intiial proposal stage and through the pilot study, the researcher's perspective changed, resulting in thesis changes which consequently influenced the researcher's viewpoint. In a practical thrust, interviews were conducted with three consultants participating in a pilot study in an attempt to gain a fuller understanding of what the role of a consultant actually entails. This dimension of the study was guided by an intention to critically reflect on the clarity and relevance of the research questions chosen, to help the interviewer develop experience in interviewing procedures prior to any gathering of research data for the main study, and to identify and guard against any researcher biases, assumptions, and prejudices that may have been present.

The naturalistic paradigm is grounded in a situational/interpretive orientation in which the researcher is an active participant whose values and actions can change the nature of the research experience. Values cannot be eliminated, but safeguards to ground the inquiry can be used to expose and explicate the values whenever possible. The naturalist's predisposition for grounding the data helps to ensure value resonance, since the participants' perceptions and the theory are both extracted from the data rather than being imposed on it. A reflective journal,

kept during the course of the research for the study, was used to uncover researcher assumptions, impressions, and biases about each interview. In addition, emergent themes and feelings of the respondents were recorded after each interview.

Guba and Lincoln (1981, 1982) proposed four terms to be used to judge the trustworthiness of findings that emerge from naturalistic research. Respecting Guba and Lincoln's four characteristics of trustworthiness, the researcher tried to implement these safeguards. To gain a high degree of understanding, the researcher recorded key phrases and words of the respondent which, at the end of the interview, provided a verbal summary of the interviewee's main points. To safeguard against loss of credibility, a verbatim transcript of the interview was mailed to each participant for feedback. In order to triangulate the researcher's findings and perceptions, each participant was contacted by telephone to verify the researcher's interpretation of the data and emergent themes.

After the pilot study, the researcher made every attempt to avoid questions that could be answered "yes" or "no" while guiding the interview's course. Particulars and details came from probing questions when respondents' answers were vague or outside the parameters of the question. In addition, the researcher had to be cognizant not to overphrase a question, but rather to word the question in a simple and concise manner. Member checks were also used in the study to verify and expand on relevant facts and ideas of the participants.

Referential materials--the consultants' job descriptions--were collected during the study and later utilized to test interpretations gleaned from the analyzed data. As well, a questionnaire was sent to each consultant requesting factual data on the background of the

consultants and their perceived role. The researcher found during the pilot study that gathering this factual information was time consuming and would be more appropriate in a questionnaire, which would be used to introduce the respondents to the research study.

The Act of Consulting - Research Findings

The purpose of this section is to describe in detail the practical thrust of this inquiry into the meaning of consulting.

The research data were divided into two sections. The first section presents an interpretive summary of the interviews, focusing on the proposed research questions, while the second section focuses on emergent themes present in the consultants' experiences. Sometimes what appeared to be important for one consultant did not hold much importance for another. However, a number of themes were relevant to each of the five consultants in the study.

Initially each interview was treated separately so as to attend to the participants' particular meanings and perceptions assigned to their individual experiences of consulting. An initial interpretation of each interview was drafted focusing on recurring themes. Then, with initial validation obtained through individual responses to each interview summary, the researcher was confronted with the challenge of intertwining five interpretations into one. In the analysis of the descriptive fieldnotes and discussion notes, the researcher looked for common consulting approaches or techniques, as well as variations both within and between the interviews.

Personal Data

There are five consultants and five consulting positions within this district: (a) Gifted/Fine Arts consultant, (b) Staff Development consultant, (c) Second Languages consultant, (d) Computer consultant, and (e) Special Education consultant. Four of the five consultants interviewed for the study had taught between four and seven years as full-time classroom teachers before assuming the position of consultant. Only one participant had taught between 8 and 11 years as a full-time classroom teacher. Three of the consultants had been chosen for their positions because of their outstanding work in the classroom, while one had been chosen because of her advanced education (master's degree) in her area of specialization, and another had been moved from a vice-principalship. All of the consultants had obtained or were in the process of obtaining their master's degree in education. Three of the five were enrolled in doctorate-level courses.

The consulting experiences of the participants varied from five months (first year in the position) to five years; and of the five consultants, three were new to the district. The consultants are all required to devote some of their time at all grade levels, K-12, within their designated area. The consultants' responses to percentages of time spent with teachers in general, teachers with specific concerns, and teachers assigned by administration varied to a large extent and are summarized in Table 4.

There appeared to be more agreement in the third category, teachers assigned by administration, where four consultants spent between 15 and 25% of their time devoted to these particular clients. The one consultant who indicated that she spent from 40-50% of her time with

Table 4

Time Allocation

	Percentage of Time Spent by Each Consultant				
Teachers in general	25	40-50	50	25	25
Teachers with specific concerns	60	10	35	50	60
Teachers assigned by administration	15	40-50	15	25	15

these clients had also included the teachers on her appraisal list in her calculations. All of the consultants felt that the second category was a subcategory for the first one. Keeping this in mind, the consultants spent between 50 and 85% of their time with teachers in general, and teachers with specific concerns. The district strongly recommended that all consultants spend 70% of their time working directly with teachers in the schools.

Prior to starting, three consultants indicated that they had received some in-service training. This training was in the form of assistance from other consultants established within the district or through prior university courses dealing specifically with teacher supervision or clinical supervision. All of the consultants indicated that they had some prior training which prepared them for their consulting positions. Workshops and summer courses on teacher supervision and clinical supervision were mentioned by all of the consultants; as well, one had indicated that in her master's degree program she concentrated on teacher effectiveness and teacher evaluation/supervision courses that would help her in her consulting

position. They all indicated that such preparatory training was useful in the performance of their consulting duties.

The three consultants who have attended workshops and training programs since becoming consultants all felt that such in-services were very useful to them in the performance of their duties because they provided another perspective and in many instances reinforced their existing beliefs by substantiating them with documented research. Table 5 summarizes the general substance of this training.

Table 5

Number of Consultants Attending Training Programs

Preparation/Training		Number
Subject matter		2
Teaching methods and strategies		3
Curriculum development		2
Teacher evaluation		3
Interpersonal relations		2
Inservice and curriculum implementation		3
Clinical supervision		2
Other:	Discussions with other consultants	3
	Local committees	3
	Provincial committees	1
	District committees	3

On the questionnaire three of the five consultants indicated that they had received some in-service training specifically for their new

position as a consultant. When this was pursued during the interviews, only one consultant could remember receiving from a central office administrator some form of orientation into her position. The following quotations reinforce the consultants' perception of a lack of initial guidance once assuming their consultancy position:

> My supervisor gave me a list of things that he would like to see me do. I had to do a lot of research. I spent the first few weeks doing research, finding out what had been done in the past, what resources were available. So I wasn't oriented into that; I had to do it on my own.
>
> They gave me a job description. They said, "This is not exactly what your role is, but basically you'll be doing these sorts of things." So no one actually sat down with me and indicated what the expectations were for the position.
>
> October, I guess, I read the paper job description for this position, so that was my "orientation" into that part of my official title. It's really vague, though. I go with what my perception of the job was from my initial interviews. I've got my interpretation of what they wanted, and I'm going from that. I watch the other consultants and ask a lot of questions!
>
> I was probably looked at as the resource person in my area. So that's probably why I was not oriented, I'm not sure. Every district has their own way of doing things and their own expectations for their staffs. It's mainly experience and on-the-job training!

Other experienced consultants acted as mentors and friends initiating the new consultants into their positions, offering support when needed throughout the first year and subsequent years.

> Another consultant was fabulous as far as helping me get started and giving me tips and pointers. She has been my mentor!
>
> I think that there is an understanding when you get into a consultant's position: you are seen as a resource person within that role. So in terms of content I'm not sure if there would be anybody else, other than another consultant, to in-service you.

Role/Function

All of the consultants interviewed indicated that they were expected to spend a minimum of 70% of their time working directly with teachers in their respective schools.

> Our expectation in the district is 70% of our time should be spent working with teachers in the schools. This is tough to meet, but it's a good objective to try and meet.

Another consultant felt that the mandate "was impossible to accomplish most of the time," but that "it motivates me and gives me a goal to work toward."

One consultant stressed that "the one big word used to describe us is help, and I would think that most consultants feel the same way." This was further reinforced by another consultant who felt that

> the very first reason for existence for me is to help other people. Unless you are prepared to go out there with a positive frame of mind to help the other teachers, you're wasting your time. Because if your purpose is to try and implement change through criticism, you will reach a lot of brick walls. As with teaching, I try to win the teachers over first, build their trust, and establish a rapport before we begin to discuss any concerns that I/we might have.

None of the consultants viewed their jobs as static; rather, everyone emphasized the fact that all consultants should be very flexible and able to adapt to a constantly changing, often unscheduled workday. One consultant alluded to the fact that the primary focus of her position "changes from one year to the next," and that her supervisor has her "going into new areas constantly." She sees herself as a flexible person who enjoys seeing education from various viewpoints, but cautioned that "trying to keep your perspective clear at all times is important because you have to remember who you are there for--the teachers and ultimately improved student learning."

The consultants saw themselves being placed in the we-they syndrome of central office personnel and teaching personnel. One consultant cautioned that consultants should not retreat into "central office reclusion"; rather, they should be

> in the classrooms and in the schools, visible as much as possible. Their priority is to staff, whether it's teachers or non-instructional staff; that whatever the area is they are visible, because that's where you learn about the needs of your clients. You can't do it from your desk. A number of consultants spend a lot of time in their offices preparing for fabulous workshops and in-services and pull it off very, very well, but the follow-up, which is getting into the classrooms and seeing whether or not that workshop is in place or helping someone get the ideas in place, that may not be evident in all consulting areas. I think a number of people think of consultants as being on the speaking circuit and making good money. In the schools, however, you have to be in the 'front line,' right beside your clients.

Another consultant saw herself as a bridge "between the teachers and central office personnel because "I don't want them to feel that central office is up there like God looking down. That's not the way it is, but there are a number of teachers who feel that way."

Another consultant found it very difficult to draw teachers to central office for in-services or workshops:

> Every so often I'll have a workshop here at central office, but that scares them. It's very interesting how people won't come if you have it at central office. They have all kinds of excuses, whereas if I have it at one of the schools I get a great turnout, but here I can't. I don't know why, if it's the board room or what. We tried the conference room upstairs, too. There's something about coming to central office that they don't like.

The consultants identified that they saw themselves as liaison persons for teachers and central office staff, resource persons for teachers, "trouble shooters" for administration, evaluators, coaches, gophers, and innovators. The consultants agreed that they themselves were their own worst goal setters because "there just isn't enough time

in the day to accomplish everything that we want to do and see everyone that we want to see. We're an incredible task master for ourselves. Our day starts at 8:30 a.m.; when it ends is anybody's guess!"

The consultants all stressed that

> you have to do a lot of P.R. [public relations] work when you go out to the schools, not just with the teachers, but with administration as well. You'd only dig yourself a six-foot hole if you went in like a bull moose in a china shop.

Building trust with teachers is another key element that the consultants felt they must strive to achieve. One consultant cautioned that, as the helper, she must be cognizant of not appearing intimidating to the teacher:

> I emphasize 'whatever time is convenient for you; I'm doing this for you,' and then try and build a good relationship, but I take it very, very slowly. Again, with teachers as with administration, it would be obtuse to come across as negative or a know-it-all. I emphasize my teaching experience and even though I haven't taught Chem. 30, I know about teaching, and I know about good teaching.

The five consultants attributed their busy schedules to their visibility in the schools, their skills, services, and their willingness to listen to the teachers.

> Carol Initially teachers don't approach you; you have to go and look for people who may be interested in what you have to offer. If they don't know you then they are reluctant to call and ask for assistance. So, you have to go and sell yourself and your services.
>
> Lana One of the most important things is to be seen in the schools. Because you are there in the school, people say, "Oh, I remember something I wanted to talk to you about." Just by your sheer visibility you sometimes jolt their memories.
>
> Beth In the fall I went to each of the schools, after school and at lunch time, which gave me a chance to talk with the teachers about what I could do to help them. In January I went into most of the schools for a full day and just spent the day there, which gave the teachers

an opportunity to come and talk with me, ask questions, or get something explained.

Anne I generally don't attend staff meetings unless I am asked. I just remember at the beginning of the year as a teacher and having people come to talk with us at our staff meetings and dreading it. It's not usually a good chance to sell yourself: people don't want to listen to you at the end of the day, they just want to get out and go home. In some cases it may work; though, for me, I try and avoid that situation.

Dianne A lot of things get accomplished because you just happen to be there. Often teachers really don't feel that their concern is worthy of a phone call. That's the impression I get, but if you're there they grab you and ask you about their concern or problem. So a lot of times just being there, being visible, is what spurs on the teachers. A kind of impromptu thing!

One consultant believed that being visible was important, but stressed that matching groups of teachers in similar programs in her area of specialization was a key component in achieving some consistency within the same programs in the district. She felt that if teachers worked in a more collegial manner, they "wouldn't have to re-invent the wheel every year, and as a result save themselves a lot of time." She believed that this networking between the schools would "suppress the idea of functioning as individual programs within individual schools, but that a district effort would be initiated, thus gaining some consistency within the district regarding our values and the implementaiton of those values." Another consultant strongly believed that cooperative planning helped teachers (particularly new teachers) avoid crisis situations:

> Instead of working on a crisis situation throughout the year, I like my teachers to meet at the beginning of the year and plan appropriately. If I'm responsible as a resource person, my number one goal is to help teachers plan and organize for the programs that they are responsible for.

When working with new teachers, the consultants initially met with them individually to "work them through the program model." The

consultant and teacher reviewed the Alberta Education goals and objectives as well as the district goals and objectives together. Once the teacher was familiar with these, the consultant would offer suggestions on activities and resources that could be used to enhance the core program. "This is by no means a one-shot deal, but it still becomes an overload of information at the beginning of the year." During the school year the consultants were constantly in the schools, fulfilling their mandated time allocation. Many of the consultants made it a personal rule to avoid the schools on Fridays and Monday mornings, using this time to complete their reading or paperwork. The consultants did not use their open Fridays as a time to meet as a collective to share ideas.

> I personally stay out of the schools on Friday, particularly Friday afternoon. I make Friday and Monday morning my office day. Generally I only go into a class on Monday morning if I'm invited. I give teachers that time for themselves; they don't need consultants coming and going on Friday afternoons and Monday mornings.

The consultants were all cognizant of maintaining the class's respect for their teacher. One consultant would inform the students that she was there to relieve the teacher along the same capacity as a substitute teacher:

> I say to the teacher beforehand, "If you want to go and do some marking, I'll take the class, because I want to try something." Then I'm not saying to the children, "Your teacher can't handle you"; I'm just saying to them, "You're going to be my class for a little while." Some teachers have never had this experience where someone relieves them to 'experiment' with their class. The other thing we facilitate is to encourage teachers to ask permission to go and observe other teachers teach.

Also, the consultants cautioned, teachers must be given practical solutions to their concerns which could be implemented immediately without completely disrupting their teaching style. Consultant modelling

of the practical solutions was reported as being crucial, enabling the teachers to see the new skill prior to attempting it themselves. Feedback and follow-up by the consultant further reinforced the new technique and transfer process, integrating it into the teacher's active teaching repertoire. Beth stressed that she always tried to give teachers something that they could take back to the classroom the next day and use. "If you can give them something that is really practical, that's crucial. It's important that they can come back to you and say, 'That really worked. Thanks!'" Dianne saw the teacher's role in this process as the person "in the room who is watching, listening, supervising, and learning, too." Dianne emphasized collegiality in her approach to consulting, indicating that she liked to go back a second time and support the teacher when they taught the lesson. "I'm just there for support, especially when it's a new technique that they are trying. You can't catch everything the first time, so I'm there to offer support and feedback, much like a coach." Anne also used the same approach:

> The teacher calls me or I may approach them and discuss what they want to do. Then the second step would be for me to go in and teach their class. In some cases they might take the class and just have me there to observe. There's definitely a follow-up, to make sure they feel comfortable with the material and that they are actually implementing it. The fourth step is just to call them and see how they are doing. With this process they never feel like they are going through the learning process and the trial-and-error stage alone. When someone else has taken an interest, you have more of a tendency to want to succeed and to continue to succeed and grow.

The teachers in this district were required to contact a consultant if an administrator identified in writing any weaknesses that had to be corrected in their teaching methodology. The consultants were contacted by the school administrator or by their supervisor (who was initially

contacted by the principal regarding the teacher), and given a photocopy of the letter addressed to the teacher listing, according to the principal, the weaknesses of the teacher that had to be improved.

> Initially the administrator will recommend that the teacher contact a specific consultant, and they leave it to the teacher to make the contact. The responsibility is placed on the teacher's shoulders, which is very, very good. If that person does not contact the consultant right away, then it shows that they are not taking the initiative that is expected of them. The principal then has to put it in much stronger terminology. The principal generally addresses the memo to the teacher outlining the principal's concerns and a copy is sent to me or the recommended consultant. From there the consultant and teacher deal with the problem. . . . When they contact me, I set up a meeting where we discuss their areas of concern, what they see as something they would like to work on. Now, if the administrator has been very specific about "You have to improve classroom management," "You have to improve your questioning techniques," then we work on that list first. In most instances I have had a copy of that list forwarded to me, with the teacher's knowledge, so we start from there and work on one thing at a time.

The most frequent concern that these consultants had to deal with came under the realm of classroom management:

> That is the first thing a principal seems to notice or that a student will complain to their parents about. If a principal is walking down the hall while classes are in session and everything is quiet except the room at the end of the hall where it sounds like a riot has broken out, that's pretty hard to miss.

Some of the tasks that the consultants were engaged in during the course of their year, generated through the interviews, are listed below:

1. Initiating new teachers into the district
2. Workshops or in-services
3. Correspondence to teachers, administration
4. Classroom observations and feedback
5. Teacher appraisals
6. Working with teachers on assistance programs

7. School evaluations

8. Committees

9. Attending meetings (board, administration, supervisor)

10. Resource reading

11. Paperwork (report writing)

12. Professional development conferences, activities

13. Teaching

14. Parent concerns

15. Curriculum alignment

16. Committee work

17. Informal meetings at the schools with teachers and administrators

18. Resource allocation and attainment

19. Interviewing new substitute teachers

Perceptions

Initially, as Dianne reflected, she wanted "to do wonderful things and get teachers started on new projects in the district" when she began her new position as a consultant. As the year progressed she realized that

> you have to take the first step, and then the second step after that. Now I'm working with teachers, trying to motivate them into trying some new techniques in their own classrooms. I've had to temper my grand ideas for the moment.

Anne likened her beginning as "starting out in a fog." She described her first few weeks on the job as follows:

> I knew the other person ran workshops so I was going to run workshops. The previous consultant assisted teachers, so I knew I was going to assist teachers. But as to the capacity of how much I would be doing or what I would be doing, to what

> extent I would be involved, I wasn't sure. The mandate may have been there, I'm not sure, but it wasn't clearly indicated. So I've learned a lot through trial and error, experience. My role has just become clearer for me as time passed.

Beth attributed her consulting perspective to being on specialists' councils, to discussions with other consultants both within the district and in surrounding districts, and to feedback from teachers and administrators. "Being involved with councils in my area of specialization adds to my perspective because I'm interacting with people from other districts who have the same position as myself. As a result you see another side to what you're doing." The teachers themselves surprised Beth in that

> a lot of teachers now will call me at home and talk to me about how pleased they are about an idea that I gave them and about how they implemented it and the students' reaction. Some even phone to get new ideas for a lesson they are planning for the next day, which is fantastic! I never really expected that; I thought they would wait for me to go into their classrooms and find something.

During the interviews the consultants were asked to finish the following statement: "I feel that consultants should be the type of people who are . . . ." The following list summarizes the characteristics that the five consultants in this particular district felt were vital for any person to possess in a consulting position:

Consulting Characteristics

1. Positive thinkers
2. Divergent thinkers
3. Flexible
4. Good communicators
5. People oriented
6. Good listeners

7. A link between various groups (teachers, district office, administrators, community, parents, students)

8. Resource persons

9. Able to empathize with teachers

10. Resourceful and imaginative

11. Practical

12. "Master" teachers with expertise in their field

13. Accessible

14. Visible

15. Possess strong human relations skills

16. Outgoing

17. Initiators, self-starters

18. Skilled observers

19. Able to diagnose problems

20. Skilled negotiators

The consultants all reported that they had received positive cooperation and support from both teachers and administrators with whom they had worked. There were isolated cases that each of the consultants described from their various years of experience where either the teacher or the administrator was totally uncooperative. They stressed that these were isolated incidents which happened very infrequently. Dianne indicated that

> the teachers who know me, the teachers who've been to my workshops or who have called me into their class, I think they perceive me as someone who can come in and help. They are always positive in their feedback to me. There are a number of teachers who don't know who I am; I walk into a staffroom and they think that I'm a substitute teacher, so I'm not sure what their perception would be.

Another indicated that

> I think they realize that I know what I'm talking about, that I'm not off the cuff, that I do have some background and research knowledge in the areas that I talk about. I feel a lot of respect and a lot of support from them, and I feel comfortable going into any staffroom. I haven't had any negative feedback and I would. I think you know eventually when you're not doing the job well enough because someone will tell you.

Beth, in discussing administrative support for consultants, found that with administrators,

> if you try to do something positive for their [principal's] school which they can see next week, if you can take something in and show them that it is working, then they are very supportive of your efforts because of the impact it will ultimately have on the student learning outcomes. . . . They are concerned about having the best level of education for their children and they can see that that is my goal as well in working with the teachers.

Anne also found that administrators were very supportive of her role. "Principals will call me and ask my opinion or advice about a specific teaching situation, so I feel good that they respect my opinion." She also offered some advice in the area of consultant-administrator cooperation:

> You have to have regard for school administration. When I'm in a school, I make it a policy to tell the office staff where I'm going and who I'm working with. I always follow-up with administration: "I've been to see so-and-so, just to let you know." For programs that I run, I call principals and give them a synopsis on the program in advance. Sometimes I have to ask for their support to promote the program in their schools. It's important to have that communication with them, very important.

One consultant saw administrators in general as being individuals who "are very proud of their schools, and they see us, the consultants, as people to help solve some of their problems or to make their programs that much stronger for the students."

The consultants also discussed the support they received from the district office and in particular their immediate supervisors. They

reported that senior administration was quite supportive of new ideas, the expansion of the consultants' professional development, and in particular their role in the educational system:

> Anne I feel that I have great open communication with senior administration and in particular my supervisor; we are very compatible. I am often consulted by senior administration concerning areas that come under my domain. They may be asking for advice or just need someone to bounce an idea off. So I must say that we have an excellent working relationship. I feel their respect for me as a consultant.
>
> Dianne My supervisor is really supportive of anything that I do and if I'm having problems with a teacher, then he's really good about supporting me in the situation. That's really his strong point and that's where I really need the support too, so I really appreciate it. They're supportive of my ideas. A lot of ideas can get lost in the paperwork, but I don't find that here.
>
> Beth The board is very open to improving whatever facilities and resources it has and allowing you to improve your own, if that's what you want. If I want to do the work, then they are more than supportive!

Evaluation

The consultants in this district were responsible for conducting teacher evaluations. Each consultant received a list of teachers that they were required to appraise during the course of the school year. They were not required to submit written reports to the teacher or administration, but they were expected to confer with the teacher's principal concerning the teacher's progress. All of the consultants reported some difficulty in performing both a helper role and an evaluator role when working with teachers. The consultants had to accept this as a function that was mandated, and as a result tried to limit the negative effects of the process. Carol operated under the philosophy that she would not recommend a change for one of the teachers on her

appraisal list "without first telling them how they may go about it. So in that sense you can perform both functions at the same time, where you can be the resource person and the evaluator at the same time." She did admit that "it was difficult to adjust mentally at first," not only for herself but for the teachers as well, indicating that "they may be skeptical at first, but how you [the consultant] approach the whole process makes the difference." Another consultant indicated that

> it causes conflict if first of all they are first-year teachers. I have some personal conflict with that because as a first-year teacher they need as much supportive help as they can get and my being an appraiser or an evaluator puts a lot of stresses on them.
>
> On one hand I'm saying, "Yes, you did this well"; on the other hand, I have to say, "No, you're not doing this well enough," and "You have to start showing improvement or I'm going to have to talk with your principal." The other concern I have occurs when I have a teacher on my appraisal list who has contacted me for assistance and they're having difficulty, so I work with them in a supportive role. Things don't work out for that teacher and they are dismissed at the end of the year. Then again, I'm put in another role where I have to not only help the teacher, but I also have to report to the school administration and to my supervisor as to their progress and that's a little conflicting. . . . I've never had a teacher say anything to me about this process and I know that it must be difficult for them. I'm not sure that I come out looking like the bad guy, though, because my role is so supportive. It's generally the principal who comes out looking like the bad guy, because they're the decision maker. I'm not a decision maker because I don't write their final assessment.

A third consultant viewed it as a definite role conflict but had to be content knowing that the stronger, more confident teachers on her appraisal list did not view her as a threat.

> Even as a teacher I would see it as a conflict in roles. You go in one day in a helping role and the next day you're observing for appraisal purposes. The only thing I do is try and schedule these two functions separately as much as possible. It's still hard, though.

She felt that

> the teachers that are really confident in their teaching abilities don't worry because they know they are doing a good job and don't care who comes into their class to observe them. The teachers who are a little more shaky, I think, are reluctant to have me do both roles.

The consultants relied almost exclusively on their supervisor's evaluation of how they (the consultants) performed their duties: "I guess I don't do a lot of formal self-evaluation. You never feel like you are accomplishing everything as well as you think you possibly can, but that's the same with teachers too." Another consultant indicated that "I evaluate myself by the success rate, which is probably not very fair to myself, but I feel that I have to be hard on myself. I need to know that what I'm doing is contributing and making a difference."

One area that the consultants appeared to be uncertain on concerned their formal year-end evaluations. The district had an "Assessment for School/Department Coordinator/Consultant/Supervisory Personnel" form which was drafted in August 1985 (see Appendix J). A copy of the "Certified Staff Appraisal Form" (see Appendix K) was located in the district's Certified Staff Appraisal Program book, which was drafted in January 1985 and issued to all district personnel in February 1985 (see Appendix L for contents listing). As was alluded to earlier, the consultants were hesitant in their responses concerning their formal evaluation. They admitted that

> my supervisor hasn't really indicated to me how I will be evaluated, but I know that it's coming . . . so I keep a daily log, which also helps with my monthly reports. If there is a form that he [the supervisor] is going to use, I'm not sure. I guess that I'll just have to play that one by ear!
>
> I submitted my goals and objectives to my supervisor in September, but I'm not sure if he is going to use those to evaluate me or not. Actually, I have no idea how I will be evaluated. I think we're using the teacher's form.

> There may be a standard form that is being used, but I'm not sure. We do have to write month-end and year-end reports, as well as submit our individual [program and personal] goals and objectives to our supervisors in September.
>
> I think our supervisors use the same criteria that is used for the teachers. We use the standard format, and it's perceived as being the standard procedure for one year to the next. But maybe the consultants should have a separate evaluation form because the job description is a little different.
>
> My supervisor asks me at the beginning of the year to write my goals for the year. I review those at the six-month mark and write another report indicating what I've accomplished to date in relation to my goals. At the end of the year I write another report. . . . As far as an evaluation form, they [the supervisors] use the same form that's used for the teachers. It's called "Teacher Evaluation/Teacher Appraisal Report." Some of the categories are not applicable because they relate to classroom management, to classroom teaching. But there are many areas that are applicable: organization, management skills, communication skills, commitment to the Catholic schools' faith, community, etc., so that is what the report is based on. My supervisor also receives feedback from the schools and the principals or vice-principals, so he asks for input.

Issues/Concerns

The consultants frequently voiced their concern about having to play dual functions with respect to their helping role and their evaluating role: "That's one of my biggest complaints: teacher evaluations. I wouldn't have dreamed of doing this before, to help a teacher and then evaluate them. Something has to happen in between." Another consultant indicated that there have been improvements in the area of teacher evaluations in that previously at the end of the year the consultants were required to provide the teacher with a written report as well as meet with them to discuss the appraisal:

> That written appraisal could possibly conflict with the administrator's because we were not obligated to report to the administrator as to what we were writing; in some cases the reports were completely different. This year that has changed:

> we are not required to write a report at all but we are expected to 'dialogue' with the school administration.

Even though the consultants discussed their teachers' progress with administration, the consultants reported that client confidentiality was not a concern because the consultants believed that they were "not dealing with something the principal isn't already dealing with." But, "Should they [the teacher] talk to me about the principal, I may listen, but I can't really say anything in response, and that's where I draw the line; that's client confidentiality."

The consultants strongly recommended that a prerequisite for new consultants should include some prior training in or an orientation to consulting practices, particularly in the areas of teacher observations and teacher evaluations, because of the role these consultants must assume regarding these two functions.

> Our new consultants, one month after being on the job, were put into a teacher observation situation; in fact, a school review. They had the jitters about it. They could have gone through some in-service training or orientation to help alleviate their fears prior to beginning their positions, particularly because of our evaluative function.

Another consultant reinforced the importance of an orientation program for consultants:

> I think orientation is crucial, especially for people who are involved ~~at the~~ administrative level, because of the different role and job expectations. We have a lot of support in the district for our consulting positions, but sometimes it's overlooked that there should be a little more time spent in orientation, as well as continuous follow-up throughout the year.

The consultants did not meet as a group to share ideas and concerns with one another: "Senior administration, consultants, coordinators and supervisors meet once every six weeks, but that's a very formal meeting. It would be nice if we had, as a group, 'regular' informal meeting

sessions." The consultants did share ideas in their office area or while they were on coffee breaks, but it was communicated that there was "very little opportunity for us [consultants] to get together to share, and coffee-break time is not the ideal time because coffee-break time in central office is for everyone; it's for non-instructional staff as well." Another consultant supported this idea and expressed her concern that

> we work well together; we are a really cohesive group, but we're not always here together. Everyone has different schedules, so I think that it would be nice to see a little more time spent just for sharing of ideas and for feedback amongst ourselves, just the consultants.

The consultants concurred that the most satisfying experiences of their jobs seemed to come when they were able to induce teachers to try different approaches in their classrooms, or when they were able to change the way that teachers approached their jobs and the learning environment. One consultant believed that

> if I'm able to build the teachers' confidence so that they will not only accept any suggestions that I may give and implement them, but that they will take those suggestions even further on their own, <u>then</u> I'm really making a difference in the system.

Secondly, the consultants needed to be seen as a source of help for the teachers, which enabled the consultant to feel "like a productive and worthwhile cog in the system." "I see teachers in the schools who come up to me and say, 'I'm trying this and it works! Thanks.' That's the most satisfying for me because I know I've made a difference in that teacher's classroom."

Four areas of frustration were identified by the consultants in this study: (a) trying to assist and offer suggestions to teachers who openly rejected help, (b) working with teachers who progressed too slowly and

had to be dismissed, (c) working with teachers who had very little knowledge about the children or the program they were required to teach, and (d) communication, where teachers or administrators manipulated what had been said by the consultant, "specifically, where the teacher used what I [the consultant] had said in defense against her administrator's criticism."

Emerging Themes

Four major themes became apparent once the interviews were analyzed both individually and collectively: (a) conflicting goals, (b) consultant autonomy, (c) sensitivity toward others, and (d) time. These thematic divisions helped to facilitate the grouping of similar consulting experiences under one motif.

Conflicting goals. One of the mandates for the consultants in this school district required them to perform teacher evaluations or teacher appraisals. According to the consultants, this caused problems, particularly if the teacher was new to the profession, if a teacher on the consultants' appraisal list approached them voluntarily asking for assistance, if the consultants found that they were placed between an administrator and a teacher where either party manipulated the consultant's findings and feedback to gather strength for their argument, or if the consultant had trouble building an honest, open rapport with the teachers because of the mistrust teachers have for evaluators. The consultants were concerned about the teachers who needed help and

> either won't ask for it or are afraid to admit that they need assistance because they don't want central office personnel coming into their classrooms because they believe that by exposing their problem they are inviting a low evaluation of

> their work. I indicated earlier there is always the conflict of my helping a teacher one day and the next evaluating them.

The consultants would like to introduce peer coaching into the district; they felt that

> it's non-threatening. . . . It is totally non-evaluative, so those teachers that need assistance can turn to a colleague that "understands" their problem. If the right people are chosen and trained, we can pick up the pieces of those teachers who are falling to the wayside.

The consultants felt that their main priority was to affirm teachers. They worked under the premise that all teachers had strengths that could be built upon. "I see my affirmation job as my consulting priority; the assisting and evaluating come second and third."

Autonomy of consultants. The consultants felt an unlimited freedom to be as creative as they wanted in their pursuit to help solve teachers' concerns. The trust placed in the consultants by senior administration regarding their problem-solving techniques was appreciated because "we don't feel closed in by district constraints, as long as our methods are credible and suitable and not way out in left field." The consultants, however, saw very little opportunity for regular sharing of ideas with one another, other than "when we get a minute we bounce an idea or share a tidbit of information as we see one another in the office." They viewed themselves as a very cohesive group, but due to different schedules and different supervisors, there was "very little opportunity for us [the consultants] to meet to share ideas." Coffee breaks were viewed as a social time for all central office personnel and therefore a poor time for the consultants to begin sharing information and concerns.

> We as a group don't meet regularly. We do meet fairly regularly with our supervisors to give them a report and feedback on what we've accomplished up to that point; but as

> far as the group of us getting together to share ideas or frustrations, it just doesn't happen.

Consultant orientation was identified by the consultants as an area that needed some improvement. Often the orientation of new consultants was neglected by senior administration and left to the discretion of the established consultants. "Sometimes administration overlooks that there should be a little more orientation for the new consultants"; "We can orient the new consultants but because our job descriptions and supervisors are different it'll be one perspective only, which may not coincide with their supervisors'." The consultants did mention that another experienced consultant often acted as a mentor during the initial "awkward" stages through the first year and friend (in subsequent years). "Another experienced consultant was just fabulous as far as helping me get started and giving me tips and pointers. If I have any questions I generally turn to her for guidance."

Sensitivity toward others. The consultants concurred that one of the strengths of working in this particular district was the rapport they felt existed between and within all levels of the organization. They felt that district personnel genuinely cared about each other; in particular, administration's concern for teachers was very evident. New teachers to the district were all personally contacted by the "Effective Schooling/Staff Development" consultant to help orient them into the district, which entailed

> familiarizing the new teachers with the school district in any way that I can. I contact each one personally and meet with them. I may be involved in finding them a place to stay, or give them information on day cares or sitters if they need one, information on community activities, or on the church. You could say I'm the district's own Welcome Wagon hostess! I also offer workshops that have to do with classroom management, effective teaching, starting the new year, tips for report card

> night, things like that. Some of the workshops are mandatory for new teachers, while others are run on a voluntary basis. So I just help them in any way that I can, and ease them into the district and their new teaching position.

Another consultant felt that they overloaded new teachers with information during the first part of the year, but could see no other viable alternative that would achieve the same results that they believed were crucial for the beginning of the year.

> I would suspect--and judging from some of the new teachers' comments--that there's been an overload in some areas for some of the teachers. Yet when you ask them, should some of it be eliminated? they say no, that all of it was necessary. So I think we have to fine tune. In terms of planning and organization that must be reviewed because you are assisting the teacher in curriculum alignment, their long-range plans and their efforts for the entire year.

Empathy was placed high on the consultants' list of desirable characteristics for a consultant. They felt that the consultant should not be an "add-on" to the teacher; rather, that the consultant should be a resource person for the teacher available to assist in any way possible.

> I think that we have to be able to empathize with the teacher, primarily because you have to understand all the things that a teacher has to do in a day and respect their busy timetable. If you can work with them with that understanding and feel that you're not adding to their load, rather, that you're assisting them, then things should run smoothly. We always have to work around the teacher's schedule because their "free" time is so precious.

This empathy led the consultants into establishing an unwritten policy where they generally avoided teachers' classrooms on Monday mornings and Fridays, particularly Friday afternoons, unless they were specifically invited by the teacher. "They don't need consultants coming and going Friday afternoons and Monday mornings. They have their hands full as it is on those days without having to contend with us." The empathy the

consultants had for the teachers' busy timetables also carried over in their approach to teacher appraisals. The consultants saw themselves in a helping relationship primarily; the evaluation function was of secondary importance. One consultant made it a practice to "pop into their classrooms so that the teachers and students would begin to feel comfortable with me being there. I wanted the teachers to know that when they saw me a great bomb wasn't about to drop on them." Carol approached teacher appraisals with the following philosophy:

> At the outset I would go to the person, before I do any evaluations, sit down with them and outline the areas that I as a consultant was capable of observing, and I would list them. Hopefully that would not overwhelm them. I would then ask them to look over the list and select the areas that they thought they were the strongest in. This way they would pick out their own strengths. Then I would ask them to choose some areas that they would want me to observe in the first few sessions. This way the first few sessions are helping sessions rather than total evaluation sessions. I would be helping, not evaluating, in those areas. Then within a few months they would hopefully have developed strengths in those areas as well; if not, then it would be continuous help. Finally, after they have identified some areas that they needed assistance in, that becomes part of the evaluation process. With this process we can say that we mutually agreed about their strengths and that we mutually agreed about the areas that they needed assistance in. So the teachers actually draft their own evaluation process; I'm just the facilitator. That's the process that I use that seems to be successful, so the teachers don't think that I am in their classes to look at all the areas that they are deficient in or need assistance in. Every teacher has their strengths; that's the premise I work from.

Supervisors also tried to match teachers who needed assistance with consultants whom they felt would best suit that teacher's needs. In many instances the teacher was paired with a consultant who was specialized in the area that the teacher was having difficulty with. Non-instructional staff in this school district benefitted from the consulting services as well. The Effective Schooling/Staff Development consultant organized in-services for these individuals from a needs-assessment questionnaire

that she developed. She felt that

> They're people and they have to be listened to no matter what their area is. Actually, it was nice working with non-instructional personnel because previously they hadn't had anyone listen to them or ask them what they like in-servicing in. They were very responsive, kind of like sponges, and that's a nice atmosphere to work in, with people who want to listen and contribute. They were actually a very challenging group to be with because they had a lot of needs and I had to pinpoint something that could be common.

The consultants were also aware of the time constraints that teachers also worked under, so every effort was made to assist the teachers rather than add to their already full timetables. One consultant initiated specialist planning meetings at the beginning of the school term for the teachers in her consulting area to help reduce planning time. "That whole area of team effort in the district is an important one. Why reinvent the wheel? So I meet with the teachers in my area and together we plan the program for the year." Another consultant worked under the philosophy that everything must be relevant and practical when working with teachers:

> I choose things that are relevant and things that teachers can use. We could sit down and do a bogus lesson of any topic that can show the teacher technique, but what's more relevant is that they have to teach the next day. So we plan a lesson, using whatever technique that we are concentrating on. They are able to say then that the time we spent together was useful and practical.

The consultants in this district tried to work in a proactive role rather than a reactive one: "Instead of working on crisis situations throughout the year, we get together with the teachers at the beginning of the school year and plan appropriately." Similarly, when senior administration wanted to implement a new idea at the classroom level, the consultants generally tried to discuss the change with the teachers whom it would affect: "To implement a new idea the ideal process would be to

go to the grass roots to discuss it with the individuals that the change would affect. I like to do this before I put anything in writing."

One change that the consultants would like to see implemented embraces the whole area of teacher observation and assistance. The consultants were in the process of drafting a proposal to be presented to the school board to receive financial assistance to introduce a peer coaching program for the entire district. The teachers had been encouraged to observe one another for the past few years, but no financial assistance had been available for administration to draw on to help offset lost teaching time and the cost of substitute teachers. The consultants felt that

> It is a great way to go, because there are so many good people in the district that all they need is someone to organize them, to train them, to affirm them and then to send them off. . . . It'll be particularly successful with those teachers who want help but not from central office. If the right people are chosen to be peer coaches, we could have a fantastic support system for those teachers that need assistance.

The consultants felt that the introduction of a peer coaching program would help to allay their apprehension concerning their consultative and evaluative roles when working with teachers. The consultants viewed these as conflicting functions for themselves.

Time. Finally, time had been identified as a limiting factor, particularly when the consultants were involved in school reviews while working with teachers on assistance programs. The consultants realized that it was "one of the hazards of being an educator, but teachers have to bring a lot of work home at night like we do." The consultants reported that they saw "very few lulls during the year; it's just a shift in the activities." All of the consultants drafted a timeline of goals and objectives that they wanted to accomplish during the year, but one

consultant found that she wasn't accomplishing her set goals in the timeframe she had established. "I was rolling them all over: October went to November, and November went to December, so I said forget this, let's just do it!" Beth realized her inability to follow a predetermined schedule and proposed the following solution:

> I submitted my yearly plan to my supervisor, but I work on a weekly budget rather than a strict daily one or an exacting monthly plan. I do have certain tasks that have to be completed at certain times during the year, but I'm much happier if I have all kinds of things that I know I have to do. I want to know that if a teacher suddenly develops a terrible problem I can go to them and worry about the rest later.

Anne found that

> The only occasions where there's not enough time in the day occurs during school reviews. Not only do you have the school review which is totally time consuming, you still have all your other responsibilities to budget for. That's when you get pretty frazzled. Otherwise I find that I manage my time well enough, that I'm not run off my feet all the time. If I have a couple of evening sessions on the go, that gets tiring, because I like to thoroughly plan for my workshops. Running workshops, working with teachers on assistance programs, teacher appraisals, all of these take time to plan for. . . . A lot of my time during the day is spent in the classroom and going for feedback conferences, drop-ins, planned appointments, going to see teachers during their preps; that's all very time consuming.

All of the consultants stressed that personal goals and priorities that were not work related should be established "to take care of some of the stresses that are encountered in our jobs." One consultant always made time at the end of the day for "self-expression and exercise." Another reinforced by stating that

> you have to set some priorities, personal priorities for your home life as well, and make sure that it's something your family considers is important, supports you on, and enjoys seeing you do it. Your family can be terrific motivators for you, especially after you've had a long, hard day!

Summary

In this school district senior administration chose "master" teachers in their areas of specialization to fill consultancy positions as they were created. These consultants strongly believed that in order to promote the improvement of teaching, honest, open, and supportive interaction must take place. The consultants reported playing a number of roles during the course of their day or interactions with teachers, depending on the assistance that was required.

Scott (1981) found that a lack of a definite role description led to frustration, tension and inconsistency in expectations for some consultants, but for others this freedom and professional independence was appreciated. The consultants in this district saw this freedom as an indicator that they were viewed as being competent and credible professionals. Their creativity as classroom teachers was viewed as a desirable characteristic of consultants, so the freedom to be creative and imaginative in their approach to problems and programs was appreciated.

Given the right learning climate, the consultants found that teachers experienced increased self-confidence, improved classroom teaching, a broadened perspective, and positive personal and professional contact with other educators. The consultants felt that they provided needed companionship to teachers while helping them to learn new models and skills that expanded their teaching repertoire. This companionship also enabled the teachers to share frustrations and successes, perceptions of new skills and problems encountered, as well as a time to brainstorm, share ideas, and receive useful feedback from the consultants.

Peer coaching--consultants coaching teachers to coach one another--is one strategy that has been utilized by school boards to promote professional growth and educational change. The consultants aware that there was always a fear of failure by the teachers when trying something new provided companionship to help reduce the feeling of being alone and increased the feeling of support. In order to promote the improvement of teaching, the consultants were aware that trust and faith had to be established with their clients. To assist and help teachers one day and formally evaluate them the next definitely caused a conflict in the consultants' perception of their primary and secondary goals; as well, it caused some problems in establishing and maintaining client trust. The consultants viewed an evaluator as an individual with authority, as opposed to a consultant who was generally viewed as a resource person, facilitator, and helper, which removed the potential threat of negative consequences.

Finally, the consultants reported that once teachers had been identified by administration as needing assistance, it was the responsibility of the teacher to contact the consultant. Once the teacher had contacted the consultant an assistance program would begin. In most instances the consultants received total cooperation and support from teachers and administrators in the schools.

Chapter 5

Summary, Findings, and Implications

The main purpose and specific aims of the study are reviewed and summarized in the first section of this chapter. The basic research questions which provided the framework for the investigation and analysis are recapitulated; as well, the manner in which each research question was addressed is outlined. Secondly, some reflections based on the research and findings of the study are presented. Finally, some implications concerning the major findings of the study and their relationship to further research in consulting are outlined.

Summary

The main purpose of this study was to gain a deeper understanding of the roles and functions of consultants in the educational system. This study attempted to probe into the meaning of consulting by exploring the lived experiences of five educational consultants. To ensure the accumulation of information that was accurate and adequate enough to generate grounded theory, the naturalistic paradigm was employed. Qualitative methodology, with phenomenological and symbolic interactionist perspectives, was utilized. The nature of reality in the naturalistic paradigm was based on the meanings and interpretations that the individuals in the study ascribed to their reality; it was imperative, then, that the exploration of the meaning of consulting occur within concrete situations.

A pilot study was conducted prior to the actual research data collection to guard against researcher bias and design flaws. The same interview guide developed for the pilot study was utilized, with some alterations, for the actual research study. All interviews were tape-recorded and transcribed for ease of analysis. Paper job descriptions were also obtained from the consultants or their supervisors to help triangulate the researcher's findings.

The following questions provided the framework for this investigation:

1. What are the predominant orientations in consulting practice and in educational research?

2. What are the concrete experiences and perceptions of consultants concerning their consultancy role?

3. How are the consultant's services assessed?

4. Are there any issues or concerns that consultants want addressed?

These questions were addressed categorically in Chapter 4.

Chapter 1 placed current thinking about consulting in an historical perspective through an examination of those events which influenced the formulation of current theory and practice. In order to come to a deeper understanding of the essential meaning of consulting, eight sub-problems were formulated to help facilitate data collection and determine the consultant's role in the educational system. The chapter concluded with the rationale for the study and an overview of the thesis.

Following the introductory chapter, Chapter 2 desribed some theoretical and practical components of consultancy according to key authors in the consulting field. An integral part of the study's design

included a review of the literature, which included a brief description of (1) the nature of consultancy tasks, (2) role expectations, (3) the consultant's function, and (4) research into the consultative role and function. Chapter 2 concluded with a summary of the conceptual framework for the research study.

Chapter 3 outlined the dominant research paradigm that was utilized for the research study. The researcher found that the most appropriate procedure to adopt for this study encompassed the naturalistic research paradigm, employing qualitative methodology with phenomenological and symbolic interactionist perspectives. Secondly, the dominant assumptions underlying the above orientations were described and assessed in terms of their appropriateness for the study. Finally, the rationale behind the selection of research instruments and data collection procedures used and an outline of the pilot study were provided.

Chapter 4 introduced the practical dimension of the study with a phenomenologically oriented description of the lived experiences of five educational consultants. An interpretive summary of five interviews which focused on the research questions was presented, followed by a summary of the emergent themes present in the consultants' experiences. The chapter concluded with a brief summary of the findings.

Chapter 5 critically examined the consultants' interpretations of their roles and functions in the educational system. Suggestions were offered in terms of role clarification, particularly in the areas of teacher evaluations/appraisals and peer coaching. The chapter concluded outlining possible areas for further research in educational consulting.

Findings

Although the backgrounds of the consultants varied, the respondents interviewed felt that their sound knowledge and expertise in their field of specialization, in conjunction with their organizational and leadership abilities, were determinate factors in the acquisition of their consultancy position. They suggested that, having moved through the system as teachers, their credibility was strengthened, where teachers viewed them as coaches or mentors who had the skills and experience to enhance the teachers' repertoire of skills. These consultants strongly believed that in order to promote the improvement of teaching and the curriculum, honest, open, and supportive interction must take place, which supports Goldhammer et al.'s (1980) findings. To be effective, the consultants reported that they needed up-to-date information, both theoretical and practical, to enable them to contribute toward the improvement of education. The timeframe the consultants scheduled to improve themselves professionally in this area generally occurred on Fridays, when they did not schedule visits in the schools or during their evenings at home.

As with Goldhammer et al.'s (1980) research, the job descriptions of the consultants varied among the consultants, which was understandable, but also among the consultants who shared similar positions in the pilot study and the research study. The consultants in the research study appeared to be unaware of their paper job descriptions. They had indicated that they had a general idea of what their role and function was, but were unaware in some instances of anything formalized in writing (see Appendix M for job descriptions). The job descriptions appeared to be well organized and explicit in the district's expectations of the

consultants' various functions and responsibilities. Perhaps the expectations of senior administration could be better communicated to the consultants to ensure role clarity for the consultants.

Four areas were identified by the consultants that categorized the services they provided for their clients. The four instructional improvement processes listed by Cawelti and Reavis (1980) summarized on page 18 of this report best summarize the consultants' categories of the consultants. To be effective, the consultants reported that they had to initially make teachers and administration aware of their services and role in the system in order to have their services utilized.

As mentioned in the literature review, all professionals need clearly set guidelines and boundaries in order to function with minimal tension and role ambiguity. These guidelines and boundaries must be communicated to school administration and teachers to reduce conflicts in perceptions. The consultant has been described as being in a helping relationship, providing expert information, advice or a service. In order to do this effectively, an honest, open exchange of information and ideas must take place between the consultants and their clients. The building of this mutual trust and honesty will be extremely difficult if consultants also have a formal evaluative role. An evaluator has authority over those being observed; a consultant, on the other hand, generally is seen as a resource person, facilitator, and helper, which removes the potential threat of negative consequences.

The functions most commonly mentioned by the consultants were to provide assistance to teachers and administrators, to help obtain instructional materials, to give demonstration lessons, to complete teacher appraisals, and to provide workshops to expand the teacher's

professional development. The consultants felt that the interpersonal relationship between consultants and clients must enable the two to give and receive information, where both examine all potential solutions and alternatives and select the best approach based on the needs of the client. The consultants all agreed that their main function was to assist teachers/educators, placing a great deal of importance on their helping relationship. Initially, the consultants did have some difficulty marrying the helping and evaluating functions, but appeared to be able to justify to themselves and their clients why it was a necessary element of their job. The most common concern the consultants were asked to address dealt with classroom management, motivation and lack of time to implement new activities, which also supports Harrison's (1978) research findings on consultative assistance requests.

The list of desirable consultant characteristics generated by the consultants in the study corresponds closely to the lists suggested by English and Steffy (1983) and Lippitt and Lippitt (1978). The consultants all felt that the method of intervention was dependent on the teacher's concern and the teacher's willingness to change the undesired behavior. The consultants reported that their most favorable experiences occurred when they were able to persuade teachers to try something different or when they were able to change the teacher's behavior in the classroom, which improved student learning. If the consultants felt that they were a source of help for the teachers, and were able to bring about effective change in teachers' behaviors or attitudes in the classroom, they were able to justify their role in the educational system. The consultants viewed themselves as change agents and co-participants who gradually "moved behind the scenes."

As well, during this period of fiscal restraint many school boards are modifying, temporarily "suspending," or eliminating some consulting programs or services. In this sense school boards are following Alberta Education's example where "those programs which are essential and impact on the largest number of students will be maintained at appropriate levels" (Alberta Education, 1987, p. 21). The Directions to 1990 report (Alberta Education, 1987) describes Departmental priority initiatives which Alberta Education proposed to improve education in Alberta. Implementation of these initiatives began in 1987 when the report was released and will continue to 1990. In this report managing restraint was identified as a priority-one initiative (number 4 of 11 identified), whereas teaching effectiveness was identified as a priority-two initiative (number 1 of 8 identified).

Alberta Education is implementing a series of actions to assist school boards to manage restraint while continuing to make improvements to their systems. As was mentioned previously, this is a period of fiscal restraint and as a result some of the "fringe benefits" that school boards have been able to offer in the past are presently being cut back due to budget restrictions. One of these "fringe benefits" concerns the consulting services that are offered. All areas of education are being affected by budget restrictions. Consultants themselves see their numbers dwindling because of the cut-backs, but their workload is increasing because of the movement toward more accountability. One consultant in this school district was not even sure if her position would be renewed for the following year. As a result, she found that

> I'd like to do a lot of planning for down the road, and it crops up every once in a while and I wonder if? If it happens, it happens. You see, this position was created because it was

> a priority. If the district changes its priorities around, then this position may not be necessary.

Finally, some teachers did not recognize that they needed help and consequently did not ask for it, while some teachers had no desire to improve their teaching skills; they only wanted to maintain a satisfactory level of performance. When teachers were identified by administration as needing assistance, it was the responsibility of the teacher to contact the consultant. In some instances the consultant's supervisor was contacted by administration and the supervisor assigned a particular consultant to help the teacher. Once the teacher contacted the consultant, the teacher may or may not accept the consultant's advice, which led to frustration for the consultant if their advice was not accepted. Teachers also monopolized the services of the consultant and rendered the consultant unavailable to other teachers, which caused frustration for teachers who felt that consultants were not always available when their services were needed.

Implications

The literature on teacher evaluation is enormous, with hundreds of articles dealing with the theory and practice of teacher evaluation. Particularly relevant to this study is the conflict between the helping and the evaluatory roles in consulting and supervision, which is rooted in educational history. Many teachers and supervisors/consultants see formal assessments as subserving the task of teacher improvement. Goldhammer et al. (1980) found that

> Nearly all discussions of supervision, in textbooks and periodicals over a half century, have wrestled with the difficult problem of separating helping behaviors from

> evaluating behaviors on the part of supervisors, since the helping functions have most often been assigned to the same persons. (p. 13)

The authors further suggested that "every effort must be made to reduce the teacher's natural tendency to be apprehensive about supervision" (p. 48). Pfeiffer and Dunlap (1982) further reinforced this finding that "too often teachers associate evaluation with getting rid of a teacher" (p. 161). Pfeiffer and Dunlap suggested that

> the purpose of teacher evaluation should be clarified for both appraiser and appraisee. Ideally, the supervisor should not evaluate for hiring, firing, or promotion, since a helping relationship is difficult to maintain with a person who makes decisions about termination.

Tanner and Tanner (1987) observed that administrators often called on supervisors and consultants to assist them in writing final evaluations: "Principals often use them [supervisors] to evaluate and assist in dismissing incompetent teachers. These circumstances tend to interfere with the helping relationship needed to work productively with other staff members." As a result, they found that

> the findings of research indicate that although district-level supervisors are usually available to bring their expertise to bear on teachers' problems, most teachers do not take the initiative in drawing upon supervisors for help. No doubt, many teachers are afraid to ask for help from supervisors because they believe that by exposing a problem with their teaching, they are inviting a low evaluation of their work from the principal; good teachers do not have problems, or so the myth goes, and any help that might be forthcoming is viewed as not being worth the risk. (p. 105).

Pfeiffer and Dunlap (1982) also found that

> No teacher wants to seek help from an individual who may use the request as evidence of inability to cope. In reality, the supervisory staff may be evaluating teachers to provide the data for administrative decisions. Although final administrative decisions are not delegated to a supervisor, the supervisor is often expected to share information about teaching competency and teacher growth with administrators.

In this particular study the consultants were expected to "dialogue" with the school administrators to assist them in their final evaluations of teachers. Similarly, when a consultant was working with a teacher on an assistance program, the consultant was expected to inform the school's administration on the continuous progress of the teacher. It would be understandable if the teachers in this district felt threatened by consultants when they are unaware of how the information will be used.

It would be reasonable to presume that adding summative evaluation to formative evaluation would tend to reduce the collegiality and mutual trust that the consultant and teacher need in order to function in an honest, open relationship, but these two responsibilities of evaluation and assistance are often combined. Popham (1988) argued: "A key shortcoming, then, with today's teacher evaluation practice is that its formative function contaminates its summative function, and vice versa. The resultant confusion in mission and method leads to ineffective teacher appraisal systems that neither remove nor improve teachers" (pp. 270-271). It follows that if the formal evaluation of teachers must be completed and if the improvement of instruction through consultants is desirable, then the two roles must be separated if they are to be effective. One method of accomplishing this separation would be to allow the consultants to work strictly in a helping-assisting relationship with teachers, where the information gleaned about their clients is not made available to the summative evaluator under any circumstances. The school districts in the pilot study and the actual research study should clearly define the role of the consultant regarding summative teacher evaluations, and keep the formative function of teacher evaluation separate from the summative function of teacher evaluation. Practically

speaking, however, this divorce of the two functions is difficult to achieve.

Goldhammer (1980), Glickmann (1985), Popham (1988), and Acheson and Gall (1987) all concurred that the individuals who complete formative teacher evaluations must be different from the individuals whose function is to effect summative evaluations. Popham insisted that

> The individual(s) who carry out formative teacher evaluation must be different from the individual(s) who carry out summative teacher evaluation. It's just that simple. Not only should the formative and summative teacher evaluators be different persons, but the procedures employed and records gathered for the two missions should be kept totally separate. Information about a teacher gathered by a formative teacher evaluation should not, <u>under any circumstances</u>, be made available to a summative teacher evaluator. Violations of this division of responsibility will deprive the formative teacher evaluator of the candid teacher reports so necessary if teacher weaknesses are to be eliminated. Similarly, the less fine-grained data gathered by the summative teacher evaluator should not be made available to the formative teacher evaluator because the global nature of summative data will often be misleading to the more focused concerns of formative evaluators. The two evaluative activities, although often occurring in tandem, must remain distinct. (pp. 271-272)

Glickman (1985) also indicated that

> direct assistance involves helping the teacher in continuous reassessment and change. When the task is one of getting a teacher to meet a prescribed level of performance--whether established by school administrators, central office, school board, or principal--then the procedures used for working with teachers are less supervisory and collegial and more administrative and directive. (p. 270)

In view of the research reported here, school boards should reexamine their practices in teacher evaluation. It is indisputable that the emphasis on accountability has increased general awareness of the importance for evaluation, and that some form of evaluation is necessary. The involvement of consultants and supervisors in both formative and summative evaluation is inevitable in some school boards. The basic

conflict of these two functions, however, is one of the more serious and unresolved problems facing consultants and supervisors in today's educational system. Many authors have argued that the two evaluative functions are useful if separate, but counterproductive if combined, but a number of school districts, including the one utilized in the research study, marry these two functions. Lewis and Miel (1972) recommended that

> if individual consultation is to be made truly useful in the improvement of teaching, the rating visit must be eliminated. This use of observation has consistently interfered with the cooperative planning and mutual learning function that the supervisory conference might serve if observation were restricted to gathering data to improve teaching. (p. 215)

The consultants in this district were also under the impression that they would be evaluated using the same form that was used to evaluate the teachers. The consultants appeared to be unaware of a form that was drafted in August 1985 to be used to evaluate coordinators, supervisors, consultants and department heads. The appraisal book that all educational personnel received in February of 1985 led many educators to believe that one standard form would be used to evaluate all educational personnel in the district. Four questions critically come to mind with this information: (1) Why has a revised appraisal book not been distributed to district personnel outlining the changes? (2) Why have the consultants not been notified of the changed form? (3) Are the supervisors still using the old form? and (4) Are the supervisors completing the evaluations at all, or are they using their own form?

Some school districts have adopted the clinical supervision model of teacher assistance because it appeared to meet some of the current needs of teachers, supervisors, and the education profession generally. Clinical supervision, whatever its advantages, is a time-consuming

process whether Goldhammer's five-step model or Cogan's eight-step model is used. Harris (1976) found with clinical supervision that

> Time is always a scarce commodity. . . . Time pressures are especially serious where clinical supervision is concerned because a substantial number of hours must be committed over fairly long time frames. Furthermore, the highly individual nature of the clinical relationship strains the time resources of both client and supervisor. (p. 86)

The post-conferences are particularly time consuming and difficult to schedule because the time must be convenient for both the teacher and the consultant. If classroom schedules are interrupted because of scheduling for pre- and post-conferences, the goal of improved instruction and student learning will also suffer. The consultants in the school district studied adopted the clinical supervision model and had found that time became a limiting factor. They were in the process of formulating a proposal to be presented to the school board recommending the implementation of a peer coaching program.

Peer Coaching

In the peer coaching program the positive effects are dependent on administrative support in conjunction with commitment by the teachers involved. Contrary to the established concept of teacher autonomy and isolated practice, coaching is a collegial activity. Robbins and Wolfe (1977) found that teachers involved in a teacher effectiveness program, coaching one another, spoke "glowingly of an increase in collegiality, collaborative work, and shared responsibility for decisions in their schools" (p. 60).

To achieve this open and sharing climate, Seller (1988) suggested that "the objectives set by the coaching teams must be consistent with

the more global goals for the school that have been established by the principal and staff committees. Teachers therefore identify their personal concerns within a larger framework" (p. 12). Teachers involved in this process must have the desire to improve their classroom effectiveness and take ownership in the peer coaching program that they are participating in. If teachers are not attending of their own volition, the presentation of the process and the training model will not be internalized and as a result will not become part of a long-term plan of that teacher to use the strategies to improve their classroom effectiveness, in turn improving student learning.

Administrators must be very careful in the selection process to determine those teachers who will become involved in such a program. If peer coaching is new to a district, screening is particularly important to set the stage for future success of the program. Some participants may be involved in the program because it has been "mandated from above." In many cases these participants enter the training process with negative feelings, which, for a number of them, change as they become immersed in the program. Unfortunately, some negative feelings do not change; these individuals should be counselled out of the program until they are ready to be open and receptive to this type of assistance.

The evaluation of teachers implies a judgement about a teacher's competence in the classroom, whereas coaching implies non-threatening assistance in a learning process. Teachers must be trained to 'help' their team member and not make judgements about their teaching, which is what teachers are generally subjected to when administrators enter their classrooms, and as a consequence the only reference point for teachers. Teachers are more numerous than administrators and consultants; as a

result, it is much easier for teachers to meet with one another, but the support and cooperation of administration is necessary to facilitate this program.

Showers (1985) in her research discovered that "establishing a coaching program requires strong leadership from principals as well as support from central administrative staff" (p. 47). In describing a study by researcher Beverly Showers, Huddle (1985) also indicated that the "principal must work to arrange logistics and establish new norms that encourage collegial planning, public teaching, constructive feedback, and experimentation" and that they "are in a unique position to encourage peer supervision or coaching through supportive scheduling that allows for training, peer observation, and feedback" (p. 62). The administrator, then, plays a key role in the organization of a peer coaching system, arranging it cooperatively to ensure that the positive effects of coaching develop and endure.

The support strategy utilized by administrators may involve using specialist teachers to release teachers for observation periods, hiring substitute teachers to cover classes, some principals may assume classes to provide observation time for teachers, and in some instances classes may be videotaped. Implementation of peer coaching in a school should not be an "add-on" to regular duties, where teachers are required to attend training sessions after school when they are often tired and busy with other commitments. Providing time during the teacher's working day to attend training sessions indicates to the teachers that their professional growth is seen as valuable and worthwhile.

Hunter (cited in Brandt, 1985) believed "coaching and supervision are the same," where she defined a coach as "a person who has the skills

to enable another person to perform better" (p. 64). Hunter also noted that many principals are afraid to coach teachers because they feel that to help a teacher they have to be able to teach better than the teacher. Berliner (1982) further supported Hunter's theory by calling coaches "connoisseurs of teaching, where they may not necessarily have to be superior teachers themselves, but they must know good teaching" (p. 14).

Garmston (1987) reported that administrators develop and maintain peer coaching in their schools in five ways: (1) selecting a coaching model most likely to produce the outcomes the school deems important, (2) demonstrating that they value it, (3) providing a focus for coaching activity, (4) providing training for coaches, and (5) modeling positive coaching behaviors (p. 22). Training in coaching is essential; a little is not enough. Administrators, according to Garmston, who modelled their willingness to be observed and to receive feedback communicated two messages: that "they value the coaching process, and they are willing to risk their own vulnerability as they learn" (p. 26).

Mireau (1986) offered comment on a teacher effectiveness program (peer coaching) by referring to the fact that

> if the supervisory process is based on aspects of teaching which really do have a relationship to improved student progress and which are specifiable and possible to implement, then teachers have less reason to dread the process. In addition, if the supervisor focuses on future improvement and provides recognition for present teaching practices, then teachers will even find the process informative and useful. (p. 15)

Peer coaching must be viewed as valuable and worthwhile by both administrators and teachers for implementation to be successful. Seller (1988) emphasized the fact that "peer coaching is one strategy for promoting profesional growth and educational change that is reasonably

feasible even in the face of declining funds and is consistent with most recent literature on change and teacher growth" (p. 11).

Joyce (1987) was asked to comment on what general circumstances were needed to make coaching successful. Training was reported to be the key element for success in the program, with the suggestion that "there's an understanding that every month or so you'll come together and get more input or share experience. Building in regular times for people to think about whatever they're working on makes a big difference" (Brandt, 1987, p. 13). To be able to process the new strategy and transfer it to an active repertoire, to the long-term memory, takes guided practice, feedback, corrections, independent practice, and, finally, review and self-evaluation. Showers, Joyce and Bennett (1987) reported that "sustained practice in the classroom is necessary until transfer is achieved, or there will be an erosion of the cognitive and interactive skills necessary to implement the practice" (p. 86). Once transfer is achieved, "further practice can elaborate the skills and maintain them; but they will not be lost through disuse, although they may get 'rusty' and need practice to recover their former vigor" (p. 86).

To summarize, Showers (1985) offered three main purposes of coaching: (1) to build communities of teachers who continuously engage in the study of their craft, (2) to develop the shared language and set of common understandings necessary for the collegial study of new knowledge and skills, and (3) to provide a structure for the follow up to training that is essential for acquiring new teaching skills and strategies (p. 43).

<u>The process of coaching</u>. The training of coaches is not a one-day or workshop activity; it is a continuous process with feedback from

trainers. Trainers monitor the teaching and peer coaching process (feedback) and provide additional information or demonstration of skills where necessary. Ideally, coaching teams are developed during the training process; often prior to sessions beginning, teams are formed, so that the team can learn and grow together. The training sessions should be held during school hours and ideally at locations away from the school, while substitutes take over teachers' classes. Seller (1988), Robbin and Wolfe (1987), Showers (1985) and Joyce and Showers (1982) all included the following as components of a peer coaching model: (1) presentation of theory, (2) modelling or demonstrating, (3) practice in protected/simulated conditions, (4) structured feedback, and (5) coaching. All are necessary elements that teachers need to internalize and consciously transfer to the classroom.

Joyce and Showers (1982) strongly believed that "when the coaching component is added and implemented effectively, most (probably nearly all) teachers will begin to transfer the new model into their active repertoire" (p. 5). They use the analogy that teachers are like athletes learning a new skill or move, and in order for them to put the newly learned skill into use they need to be coached. The main difference between teachers and athletes, however, is that "athletes do not believe mastery will be achieved quickly and easily" (p. 8).

Garmston (1987) suggested that there were actually three coaching models: technical, collegial and challenge coaching (p. 20). The technical coaching model was developed from the work of Joyce and Showers. Technical coaching, as reported by Garmston, generally followed staff development workshops in specific teaching methods, where consultants worked with teachers, or teachers with one another. The

coach in this model provided feedback in a non-threatening and supportive climate. There can be a tendency for coaches to give advice or constructive criticism, and in some cases this places the teacher on the defensive.

The major goals of collegial coaching are to "refine teaching practices, deepen collegiality, increase professional dialogue, and to help teachers to think more deeply about their work" (Garmston, 1987, p. 20). The long-range goal of this model is self-coaching. Open professional dialogue is encouraged, where the coach helps the teacher to analyze and interpret their teaching strategies, together making adaptations and suggestions for future teaching. Collegial and technical coaching are frequently accomplished in pairs, whereas challenge coaching is completed in small groups.

The challenge coaching model "assumes that team problem-solving efforts by those responsible for carrying out instruction can produce insightful, practical improvements" (Garmston, 1987, p. 21). Non-teachers such aids, librarians, even administrators, may be included in challenge teams because of their insights, perceptions, expertise or potential role in the solution of the identified problem.

Selection of one of the three Garmston (1987) coaching models would depend on the desired outcomes identified by administration. Technical coaching is most effective for transferring teacher training to classroom application; collegial is most effective for promoting self-initiating, autonomous teacher thought and improving school culture; and challenge coaching is most effective to solve instructional problems using small groups (p. 22).

Regardless of the model chosen, practice of the new skill or

strategy is essential for transfer of learning to be maximized. Joyce (cited in Brandt, 1987) emphasized this fact, indicating that "to learn any new skill, you've got to practice it a lot in the first couple weeks immediately following training. That's why summer workshops aren't necessarily the best time" (p. 13).

Effects of coaching programs. The results of coaching programs, as reported by Showers (1985, p. 45), contribute to transfer of training in five ways. Coached teachers (1) generally (though not always) practice new strategies more frequently and develop greater skill in the actual moves of a new teaching strategy than do uncoached teachers who have experienced identical initial training; (2) use the new strategies more appropriately in terms of their own instructional objectives and the theories of specific models of teaching; (3) exhibit greater long-term retention of knowledge about and skill with strategies in which they have been coached and, as a group, increase the appropriateness of use of new teaching models over time; (4) are much more likely than uncoached teachers to teach the new strategies to their students, ensuring that students understand the purpose of the strategy and the behaviors expected of them when using the strategy; and (5) exhibit clearer cognitions with regard to the purposes and the uses of the new strategy as revealed through interviews, lesson plans, and classroom performance than do uncoached teachers. To facilitate this transfer, the presentation of the process and the training of participants needs to be part of a long-term plan where the trainer is available to provide additional information and assistance when required. In describing the teacher effectiveness program, Mireau (1986) suggested that the success of the program was dependent on the fact that

> the same program content is presented to both administrators and teachers and this facilitates an understanding of what is involved in setting up a workable supervisory cycle in each cycle in each school. Participants in TEP find it a worthwhile professional development experience because of the useful practice and emphasis on growth through supportive feedback. (p. 14)

Evans (1982) reported that the success of the "Program for Effective Teaching" (PET) was dependent on the participants defining behaviors they thought would bring about effective teaching, and "by training superintendents, principals, teachers, aids, and substitutes we all share a common experience and have a common language that improves communication among all levels, and even between teachers and parents" (p. 45). With feelings like these emerging, a renewed sense of commitment regarding the potential of supervision and confidence in peer coaching will develop.

In another study conducted by Freeman, Palmer, and Ferren (1980), 154 teachers of the Public School District of Columbia became involved in a peer support program. The researchers found that

> formal evaluation of the perceptions of the teachers at the end of the training year showed that 89 percent of the teachers had a more positive attitude toward supervision, 98 percent of the teachers professed an interest in improving instruction, an essential first step in improving teacher performance, 94 percent of the teachers expressed confidence in the clinical supervision model as an aid in the improvement of instruction. (p. 358)

Showers, Joyce and Bennett (1987) found that "commitment follows competence, rather than preceding it. Essentially, without extensive training, persons do not have sufficient knowledge or experience to 'buy in'" (p. 82). Teachers must feel that the program is valuable and useful for them. The effects of coaching go beyond the mastery of new skills; the sharing of lesson plans, materials, the development of collegiality,

and experimentation with new teaching styles also contributes to enhanced student learning.

Although peer coaching is time consuming and can be a 'financial inconvenience,' research indicates that it leads to greater cohesion amongst staff members. Both the observer and the observed gain from the experience because teachers as professionals have a wealth of expertise to offer their peers. Administrators and their staffs may do well to find more opportunities for sharing ideas and learning from each other. Senior administration and school administration play a significant and influential role in the implementation of a peer coaching program through both financial support and release time. In view of the problems inherent in present evaluation procedures, the dual role that consultants are often faced with, and the distrust that teachers have concerning the sincerity of consultants (particularly in the area of teacher appraisals), peer coaching appears to be a feasible and reliable method available that will help meet the needs of consultants and teachers.

Areas for Further Research

A more complete understanding of the meanings held for consulting can be further disclosed through a more intensive analysis of the lived experiences of classroom teachers who are consulted and who consult with other colleagues (e.g., peer coaching model), teachers who return to the classroom as students, and other educational administrators and consultants who consult with teachers. Other worthwhile topics for investigation could involve the identification of skills, characteristics, processes, and prior training needed by consultants in the art of consulting. The perceptions of teachers, administrators and

consultants would provide a diverse range of expectations. Finally, it would be enlightening to see which of the various consulting models had been adopted by consultants and what their perceptions were on the effectiveness of the model chosen.

By its very nature, the essence of the supervisory function is one of giving assistance to others. Thus, the context in which the working relationship between a consultant and teacher exists is important in that it affects the extent to which the supervisor is able to effect decisive changes in teacher behavior. Recognizing the essential incompleteness of any phenomenologically oriented inquiry, other situational investigations from the perspectives of other consultants, teachers and administrators would be beneficial to come to a more complete understanding of the role and function of the consultant in the educational system. Pfeiffer and Dunlap (1982) found that

> supervision in education is multifaceted. Individuals who supervise have different titles and perform many different services. The overall goal of improving instruction is sought through a variety of activities. Professional development has assumed a greater importance in today's schools, and individualizing programs for faculty growth is essential. (p. 10)

In conclusion, a consultant's role in the educational system is a composite of all the expectations held by the people associated with the role, including the incumbent.

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Appendix A

Consultant Opinion Questionnaire

Consultant Opinion Questionnaire

Department of Educational Administration

University of Alberta

Dear Consultant:

The purpose of this letter is to confirm our telephone conversation with regard to your involvement in this research project concerning the role of the consultant in the Educational system. I am presently enrolled in a Master's program in Educational Administration at the University of Alberta, and this project is part of the requirements for the degree.

The intent of this questionnaire is to gain an understanding of the background of consultants and specifically your role in this field. Information gathered from the enclosed questionnaire will provide professional background data which will expedite the interview process when we meet at the end of February.

From this study it is hoped that a clearer perception about the service and programs provided by consultants will be gained, as well, to identify issues of concern for consultants. I appreciate the value of your time and would like to thank you for your cooperation.

Please complete the enclosed questionnaire and return it to me in the stamped, addressed envelope provided by no later than Friday, February 12, 1988. Please remember that your replies are held in strict confidence and that you are free to withdraw from the study at any time. You are ensured complete anonymity and no information volunteered by yourself will be given to any other educator or central office personnel. This study will not be used for any other purpose, other than to clarify and understand what the role of a consultant is.

I look forward to speaking with you at the end of February.

Sincerely yours,

Konsctancija Grabstas

Consultant Opinion Questionnaire

Personal Data

The following questions ask you to reflect on your educational background and comment on your present position.

1. How many years of experience do you have as a full-time classroom teacher?

None	____	12-15 years	____
1-3 years	____	16-20 years	____
4-7	____	over 20 years	____
8-11	____		

2. What is your highest attained level of formal education?

Less than a Bachelor's degree	____
Bachelor's degree(s) but less than a Master's	____
Master's degree	____
More than a Master's degree	____
Doctorate	____

3a. What is the specific title or designated position you now hold? _____

b. How long have you held this position? _____

4a. Which grade level(s) are you mainly responsible for as a consultant? Check all that apply.

K-3 (primary)	____
4-6	____
7-9	____
10-12	____

b. Is there a subject area that you are responsible for, if yes please indicate.

_____

_____

5. Are you required to spend time at each grade level that you are responsible for?

Yes	____
No	____

6. What percentage of your time is spent, on average, with each of the following groups:

Teachers in general _____%
Teachers with specific concerns _____%
Teachers assigned to you by administration _____%

The following questions are mainly concerned with the training you received prior to starting your current position.

7. What position did you hold prior to being a consultant? _____

8. On being appointed to your position, but prior to starting, did you receive any inservice training?

Yes _____
No _____

9. Prior to starting your position had you already obtained special training or taken university courses which prepared you for the position you currently hold?

Yes _____
No _____

10. If you answered yes to question 9, please indicate the type of training/education you received.

_____

_____

_____

_____

11. To what extent do you feel such preparatory training was useful in the performance of your consulting duties? Please circle one.

1. not at all
2. of very little use
3. useful to some extent
4. very useful

The following questions are based on your experience in the position you currently hold.

12. Have you attended any consultant training programs since becoming a consultant?

Yes _____
No _____

If you answered yes to question 12, please complete questions 13 and 14.

13. Please indicate the general substance of this preparation/training. Circle those that apply.

1. subject matter
2. teaching methods and strategies
3. curriculum development
4. teacher evaluation
5. interpersonal relations
6. inservice and curriculum implementation
7. clinical supervision.
8. other (please specify)

14. To what extent do you feel such in-service has been useful to you in the performance of your consulting duties? Please circle one.

1. not at all
2. of very little use
3. useful to some extent
4. very useful

Comment:

_____

_____

_____

_____

_____

Thank you for your time. I look forward to talking with you in person.

Sincerely yours,

Konsctancija Grabstas

Appendix B

Catholic School Board's 1984 Job

Description for Consultants

CONSULTANTS

NATURE AND LEVEL OF WORK

The incumbents work in a staff position on a ten month basis. The primary role is working with teaching staff in the improvement of instruction in the field of specialization. Appointments are on a two year term basis.

TYPICAL DUTIES

Visit schools and give consultative advice to teaching staff.
Assist in the inservice programs.
Assist curriculum committees in the development of educational programs as required.

Perform other related duties as required.

DESIRABLE QUALIFICATIONS

A graduate degree in area of specialization.
A valid Alberta teaching certificate.
Broad knowledge of educational developments.
Ability to work cooperatively with others.
Capacity for organization and leadership.

September 30, 1984

Appendix C

Catholic School Board's 1988 Job

Description for Consultants

CONSULTANT

Nature and Level of Work

The incumbents are expected to spend the major portion of their time working directly with teachers in assisting them with their ongoing instructional programs. The consultant's work tends to be centred at the school and classroom level.

Typical Duties

1. Work at the school level with principals and at the classroom level with teachers in implementing the Program of Studies as established by Alberta Education and/or as identified by the Edmonton Catholic School District.

2. Visit schools and individual classrooms to assist the teaching staff with their ongoing instructional programs.

3. Initiate and participate in professional development programs.

4. Assist principals in carrying out their instructional leadership responsibilities.

5. Assist line officers in carrying out their responsibilities in the evaluation of certificated staff in accordance with school system practice.

6. Assist in the evaluation of programs.

7. Assist in the adaptation and preparation of curricular materials which will in turn assist teachers in meeting their instructional objectives.

8. Work with Alberta Education and other educational and community agencies in the appropriate area and level of specialization.

9. Other related duties as assigned.

Desirable Qualifications

1. A valid Alberta Teaching Certificate.

2. One year of post-degree work in the area of specialization.

3. Broad knowledge of current educational theory and practice.

4. A master classroom teacher. Is knowledgeable and can demonstrate sound instructional practice.

5. Experience and expertise in the area of specialization.

6. Ability to work cooperatively with others.

7. Capacity for organization and leadership.

8. An advocate of Catholic education.

Term of Appointment

1. The term of appointment is usually for two years or as specified by the Chief Superintendent. If a teacher is appointed to the same consultancy three times, consecutively, he/she will not have to go through a regular competition for the position. A letter to the Personnel Department will be required annually thereafter in order to know that the individual wishes to continue. Reappointments will be based on satisfactory performance and needs of the system.

2. Incumbents will be evaluated on an ongoing basis in keeping with School District practice.

Appendix D

Public School Board's Consulting

Services Philosophy

PUBLIC SCHOOL BOARD

Consulting Services

Purpose Statement

a. to influence district direction

b. to assist others in the attainment of their results.

Definition of Consulting

Consulting is a collaborative process that leads to the attainment of mutually shared objectives. The selection of the process rests with the participant responsible for the results.

Principles of Consulting

Principle: "A fundamental truth, belief or doctrine which serves as a basis for reasoning and action."

The consultant-consumer relationship:

- is in harmony with the purposes of the district and the principles of the organization;

and

- is a collaborative process involving identification of needs, results to be achieved and on-going evaluation;

and

- places the ownership for achievement of results with the participant who is responsible for the results;

and

- is characterized by the provision of a co-ordinated/integrated service to the individual, school, district and community;

and

- promotes the autonomy of the consumer;

and

- fosters leadership through the provision of advice, assistance and advocacy.

Consultants' Role, Functions and Profile

1. Consultants' Role

The role of all consultants involves leadership, advocacy and assistance. This role will be executed in an effective and efficient manner which promotes the implementation of the district's priorities and initiatives and which helps schools achieve the results for which they are responsible.

2. Consultants' Functions

The following generic functions can be applied to all consultant positions in the division. The functions performed by individual staff members can be identified and differentiated according to the percentage of time spent on each function (range 0 - 100%)

The generic consultant functions are:

a. identifying service needs

b. initiating, planning and promoting services

c. providing specialized knowledge and skills, eg. role model.

d. monitoring and evaluating service.

e. improving and expanding current personal, team and divisional levels of skills, knowledge and attitudes.

Appendix E

Alberta Education's Job Description

for Consultants

TO IMPROVE THE QUALITY OF EDUCATION IN ALBERTA SCHOOLS IN ACCORDANCE WITH THE GOALS, POLICIES, STATUTES, AND REGULATIONS OF ALBERTA EDUCATION THROUGH THE PROVISION OF THE FOLLOWING SERVICES: IMPLEMENTATION, MONITORING, EVALUATION, ACCREDITATION, INVESTIGATION, FINANCIAL MANAGEMENT, PUBLIC INQUIRY AND SUPPORT.

1.B KEY RESPONSIBILITY AREAS (K.R.A.'S.)

1. IMPLEMENTATION SERVICES - TO PROVIDE EDUCATIONAL MANAGEMENT AND CURRICULUM CONSULTATION TO SCHOOL BOARDS, PRIVATE OPERATORS, ADMINISTRATORS, TEACHERS, AND MEMBERS OF THE PUBLIC REGARDING THE DELIVERY OF EDUCATIONAL PROGRAMS AND THE IMPLEMENTATION OF ALBERTA EDUCATION'S MANAGEMENT AND FINANCE PLAN AT THE LOCAL LEVEL, AND TO PROVIDE COORDINATION BETWEEN ALBERTA EDUCATION AND STAKEHOLDER(S).

2. ACCREDITATION SERVICES - TO APPROVE SCHOOL PROGRAM PLANS AND PRIVATE SCHOOL AND PRIVATE EARLY CHILDHOOD SERVICES APPLICATIONS TO ENSURE COMPLIANCE WITH DEPARTMENT STANDARDS AND REQUIREMENTS.

3. MONITORING SERVICES - TO MONITOR LOCAL SCHOOL JURISDICTIONS, PRIVATE SCHOOLS AND PRIVATE OPERATORS OF EARLY CHILDHOOD SERVICES PROGRAM IN ORDER TO DETERMINE THE EXTENT TO WHICH POLICIES, GUIDELINES, AND PROCEDURES OF EDUCATIONAL PROGRAMS AND SERVICES ARE BEING IMPLEMENTED IN KEEPING WITH ALBERTA EDUCATION'S MANAGEMENT AND FINANCE PLAN.

4. EVALUATION SERVICES - TO PROVIDE CONSULTATIVE SERVICES AND ASSISTANCE TO SCHOOL JURISDICTIONS, PRIVATE SCHOOLS, AND PRIVATELY OPERATED EARLY CHILDHOOD SERVICES CENTRES IN THE FOLLOWING AREAS: DEVELOPING SOUND EVALUATION POLICIES, GUIDELINES, AND PROCEDURES; DESIGNING MODELS AND PROCEDURES FOR CONDUCTING EVALUATIONS; PERFORMING EVALUATIONS OF SELECTED SYSTEMS, SCHOOLS AND PROGRAMS; EVALUATING TEACHERS IN PRIVATE SCHOOLS FOR CERTIFICATION PURPOSES.

5. INVESTIGATION SERVICES - TO CONDUCT INVESTIGATIONS AT THE REQUEST OF THE MINISTER OF EDUCATION AND/OR OFFICIALS OF THE DEPARTMENT AND/OR PROVIDE MEDIATION RELATED TO ISSUES AND CONCERNS OF THE SCHOOL SYSTEM, TEACHERS, STUDENTS AND MEMBERS OF THE PUBLIC AT LARGE.

6. FINANCIAL MANAGEMENT AND GRANT SERVICES - TO RECOMMEND, AS PERFORMANCE CERTIFIER, PAYMENT OF FUNDS ON BEHALF OF THE FINANCIAL AND ADMINISTRATIVE SERVICES BRANCH OF ALBERTA EDUCATION TO SCHOOL SYSTEMS AND PRIVATE OPERATORS IN ACCORDANCE WITH GRANT REGULATIONS.

7. PUBLIC INQUIRY SERVICES - TO RESPOND TO REQUESTS FROM EDUCATORS, TRUSTEES, PARENTS, STUDENTS, AND THE GENERAL PUBLIC FOR INFORMATION OR EXPLANATION OF POLICIES, REGULATIONS, AND INTENTS OF ALBERTA EDUCATION.

CONTINUED
Please continue on an addendum if necessary.

Appendix F

Public School Board's Consulting Services

Organizational Chart

CONSULTING SERVICES ORGANIZATIONAL CHART

ASSISTANT SUPERINTENDENT CONSULTIUNG SERVICES

STUDENT SERVICES

Team East | **Team North** | **Team West**

- Adapted Physical Education
- Audiology
- Behaviour Management
- Education – Hearing
- Education – Multi-handicapped
- Education – Vision
- Multilingual Services
- Guidance and Counselling
- Native Home-School Liaison
- Occupational Therapy
- Physiotherapy
- Psychology
- Reading and Written Language
- Social Work
- Speech and Communication

INSTRUCTION SERVICES

Team A

- Art
- Co-Curricular
- Drama
- English as a Second Language
- Learning Resources
- Mathematics
- Microcomputers
- Music
- Music Enrichment
- Native Education
- Science
- Teacher Centre
- Technical and Co-operative Work Education

Team B

- Academic Challenge
- Behaviour Management
- Communications
- Community Relations
- Early Childhood Education
- Health
- Home Economics
- Language Arts
- Learning Disabilities
- Mentally Handicapped
- Physical Education
- Social Studies

Team C

- Instructional Processes
- Leadership Network
- Second Languages
- University Liaison

Appendix G

Public School Board's Consultant

Services Division Priorities

CONSULTING SERVICES
DIVISION PRIORITIES

1. TO ASSIST IN THE ENHANCEMENT OF THE QUALITY OF STUDENT PROGRAMMING BY EMPHASIZING:
   - BELIEF IN THE INDIVIDUAL'S POTENTIAL FOR LEARNING AND DEVELOPMENT
   - THE INTERRELATIONSHIP OF THE ESSENTIAL COMPONENTS OF PROGRAM: ASSESSMENT, PRESCRIBED COURSES OF STUDY, PROCESSES OF INSTRUCTION, GROUPING FOR LEARNING, AND REPORTING
   - USE OF OUTCOMES, EXPECTATIONS, AND INDICATORS OF ATTAINMENT

2. INCREASE STAFF UNDERSTANDING OF "THINKING", ITS DEVELOPMENT AND RELATED IMPLICATIONS FOR INSTRUCTION AND LEARNING

3. TO IMPROVE THE NATURE OF DELIVERY OF CONSULTING SERVICES:
   - INCREASED RESPONSIVENESS TO SCHOOL NEEDS
   - IMPROVED ACCESSIBILITY OF SERVICES
   - IMPROVED INTEGRATION AND CO-OPERATION OF SERVICES
   - IMPROVED CONSULTING SKILLS
   - DEVELOPMENT OF A FRAMEWORK FOR CONSULTING SERVICES

4. TO INCREASE ASSISTANCE TO SCHOOLS INTEGRATING STUDENTS WITH SPECIAL NEEDS

5. TO INCREASE THE SCOPE AND USE OF CONSULTING SERVICES AVAILABLE TO SECONDARY SCHOOLS WITH EMPHASIS IN THE AREAS OF:
   - ACCOMMODATING STUDENT DIFFERENCES
   - STAFF INVOLVEMENT IN DECISION MAKING
   - GUIDANCE AND COUNSELLING
   - CONTINUITY IN STUDENT PROGRAMMING

Appendix H

Public School Board's Student Services and

Instructional Services Priorities

STUDENT SERVICES PRIORITIES

1. TO EMPHASIZE THE ROLE OF COMMUNITY AND SOCIAL AGENCIES AND TO FACILITATE THE HOME-SCHOOL PARTNERSHIP IN THE DEVELOPMENT OF STUDENTS

2. TO ASSIST SCHOOLS TO MEET THEIR GUIDANCE AND COUNSELLING OUTCOMES, PARTICULARLY AT THE JUNIOR HIGH LEVEL

3. TO INVESTIGATE AND INITIATE ALTERNATIVE APPROACHES TO SERVICE DELIVERY WHICH EMPHASIZE SCHOOL DECISION MAKING AND USE OF SCHOOL BASED AND COMMUNITY RESOURCES

4. TO ENHANCE STAFF SATISFACTION THROUGH THE PROVISION OF IMPROVED OPPORTUNITIES FOR PROFESSIONAL ENHANCEMENT AND INVOLVEMENT IN THE DECISION MAKING PROCESS, IMPROVED INTRA-TEAM COMMUNICATION AND SERVICE DELIVERY

INSTRUCTION SERVICES PRIORITIES

1. TO ASSIST SCHOOLS IN THE EXAMINATION, SELECTION, AND APPLICATION OF LEARNING PREFERENCES, TEACHING STRATEGIES AND THINKING SKILLS INTO CLASSROOM PRACTICE

2. TO ASSIST SCHOOLS IN USING OUTCOMES, EXPECTATIONS, AND INDICATORS IN PLANNING PROGRAM, ASSESSING STUDENT NEEDS, AND MONITORING AND REPORTING STUDENT PROGRESS

3. TO ASSIST SCHOOLS IN ASSESSING PROGRAM NEEDS, IDENTIFYING PROGRAM PRIORITIES, PLANNING (RELATED) IMPROVEMENT, SUPERVISING THE PROGRAM, AND PLANNING FOR STAFF DEVELOPMENT

4. TO REVIEW TYPE AND LEVEL OF SERVICES PROVIDED TO CONTINUING EDUCATION

5. TO ASSIST SCHOOLS IN GROUPING FOR LEARNING

6. TO ASSIST SCHOOL ADMINISTRATORS IN DEVELOPING AND APPLYING LEADERSHIP SKILLS IN IMPROVING STAFF AND STUDENT PERFORMANCE

7. TO FURTHER INTEGRATE THE APPLICATION OF CLASSROOM MANAGEMENT AND INSTRUCTIONAL SKILLS TO CURRICULUM CONTENT

Appendix I

Catholic School Board's Performance Evaluation:

Supervisors and Consultants

CATHOLIC SCHOOLS

DEPARTMENT OF PROGRAM SERVICES

Performance Evaluation

Supervisors and Consultants

I. OBJECTIVES

The evaluation procedure will:

1. Assist in self-evaluation.

2. Communicate performance expectations.

3. Provide recommendations for improvement of performance.

4. Affirm the worth and dignity of the parties involved.

II. PROCEDURE:

1. Staff members will be formally evaluated at least once every three years.

2. The evaluatee will be actively involved in the evaluation.

3. All formal evaluations will be fully disclosed to evaluatees involved.

4. A copy of each formal evaluation will be included in the evaluatee's personnel file.

5. Both parties to the evaluation are entitled to obtain input from clients and/or colleagues.

6. Evaluatees may appeal in writing to the Chief Superintendent, who will acknowledge, investigate and respond within 15 working days. Both parties to the evaluation will be fully informed of the appeal and the resulting response.

CATHOLIC SCHOOLS

DEPARTMENT OF PROGRAM SERVICES

Performance Evaluation

Supervisors and Consultants

NAME: _____

POSITION: _____

DATE: _____

Check the appropriate column: 1 = poor to 10 = excellent

Ratings of less than 4 require comment. Comments are optional for higher ratings.

A rating of 5 is considered acceptable/average. This is an internal comparison unique to the Department of Program Services.

1. LEADERSHIP

Ability to assume responsibility, initiate action and to take charge.

1	2	3	4	5	6	7	8	9	10

2. PROFESSIONAL RELATIONSHIPS

Ability to establish and maintain effective relationship with colleagues.

1	2	3	4	5	6	7	8	9	10

3. INFORMATION PROCESSING

Ability to absorb, interpret, summarize and disseminate information effectively.

1	2	3	4	5	6	7	8	9	10

4. COMMUNICATION

Ability to maintain effective and productive liaison with educational agents and agencies.

1	2	3	4	5	6	7	8	9	10

5. PROBLEM SOLVING

Ability to isolate and analyze problems and to conceive and implement viable alternative solutions.

1	2	3	4	5	6	7	8	9	10

6. RESOURCE MANAGEMENT

Ability to use available resources effectively and efficiently.

1	2	3	4	5	6	7	8	9	10

7. PROFESSIONAL SELF-IMPROVEMENT

Commitment to continuing development of professional expertise and skills.

1	2	3	4	5	6	7	8	9	10

8. CHANGE MANAGEMENT

Ability to evaluate proposed changes, to initiate and to manage changes effectively.

1	2	3	4	5	6	7	8	9	10

9. PROGRAM IMPLEMENTATION

Ability to plan, inservice, facilitate and monitor programs effectively.

1	2	3	4	5	6	7	8	9	10

10. ADMINISTRATION

Ability to organize and direct work of others.

1	2	3	4	5	6	7	8	9	10

11. INSTRUCTIONAL SKILLS

Ability to diagnose, recommend and model teaching strategies effectively and on an ongoing basis.

1	2	3	4	5	6	7	8	9	10

12. MOTIVATIONAL SKILLS

Ability to foster enthusiasm and commitment in self and others.

1	2	3	4	5	6	7	8	9	10

13. EVALUATION SKILLS

Ability to carry out evaluation responsibilities.

1	2	3	4	5	6	7	8	9	10

14. DEDICATION

Inclination to apply abilities energetically toward achievement of goals.

1	2	3	4	5	6	7	8	9	10

15. GENERAL COMMENTS OF EVALUATOR (Such as examples of recent accomplishments).

AREAS IN NEED OF IMPROVEMENT:

MAJOR STRENGTHS:

RECOMMENDATIONS FOR ACTION:

Evaluator's Signature

16. GENERAL COMMENTS OF EVALUATEE

Evaluatee's Signature

Appendix J

Assessment for School/Department

Coordinator/Consultant/Supervisory Personnel

CONFIDENTIAL

ASSESSMENT FOR SCHOOL/DEPARTMENT COORDINATOR/CONSULTANT/SUPERVISORY PERSONNEL

August, 1985

ASSESSMENT OF SCHOOL/DEPARTMENT
COORDINATOR, CONSULTANT/SUPERVISORY PERSONNEL
(EVALUATION FORM, CONSULTING/SUPERVISORY PERSONNEL)

NAME: _____ DATE: _____

POSITION: _____ LOC. # _____ SCHOOL/DEPARTMENT: _____

The primary purpose underlying the plan for EVALUATION OF SCHOOL/DEPARTMENT ADMINISTRATIVE/SUPERVISORY PERSONNEL is to improve job performance and to promote professional development of personnel. Secondarily, the evaluation process is expected to document the level of accountability as demonostrated by the evaluatee.

This form is designed to assist the EVALUATOR and EVALUATEE in formulating and in recording an accurate appraisal of the evaluatee's performance through a two-way procedure. In recognition of the fact that each person is an individual who must function as a team member, the opportunity to relate individual job objectives to system-wide objectives is provided for in PART I of the plan. The EVALUATEE should state objectives which relate to the categories in PART II for the approval of the EVALUATOR in the first conference.

PART I (Management Guide Format)

OBJECTIVES: Objectives should identify desired results, conditions under which activity will occur, time frame, and how attainment of objectives will be determined. Example:

Objective #1: To develop a common, informal reading inventory system with the staff in a series of workshops to be held in the fall. The objective will be considered to be attained upon completion of the design, development and testing of the materials and adoption by the staff.

SEE ATTACHED MANAGEMENT GUIDE

PART II

Part II is a checklist to be rated. Six major areas are identified as follows: (1) Personal Qualities; (2) Human Relations; (3) Instructional Leadership; (4) Professional Competencies and Growth; (5) School-Community Relations; and (6) General Administration. Areas which are applicable to individuals are to be used as a basis for establishing objectives and for rating.

The rating terms satisfactory (S), needs improvement (N), and unsatisfactory (U) serve as a means of evaluating the qualities and the performance of the evaluatee.

Satisfactory covers a range of measurement from satisfactory through outstanding and is to be interpreted in terms of the level of experience in his/her present assignment.

Needs improvement covers less than satisfactory performance for an incumbent. It should help identify some areas where the incumbent is not meeting expected standards of performance.

Unsatisfactory covers performance below normally accepted standards.

The evaluator must identify major strengths and weaknesses of the evaluatee through comments. Each of the six areas listed is to be rated by the use of a check (X) mark. If an item does not apply to present assignment, indicate non-applicable by checking N/A.

	S	N	U	N/A
I. INSTRUCTIONAL LEADERSHIP				
A. Develops, initiates, and maintains an effective instructional program which implements the goals and objectives of the school system.	___	___	___	___
B. Provides for effective use of curriculum materials, instructional supplies, and equipment.	___	___	___	___
C. Provides for and promotes effective meetings and inservice training sessions for employees as assigned.	___	___	___	___
D. Evaluates systematically the instructional program and uses the results for continuous program improvement.	___	___	___	___
E. Resourcefulness to staff in areas of instructional support.	___	___	___	___
II. GENERAL ADMINISTRATION				
A. Complies with policies of school and/or school district.	___	___	___	___
B. Develops and implements systematic business procedures (manages available funds wisely; provides correct administrative information as needed; maintains accurate records).	___	___	___	___
C. Ensures that authority and responsibility for each program and/or individual under his/her supervision are clearly understood.	___	___	___	___
D. Delegates authority effectively.	___	___	___	___
E. Recognizes situations which need improvement.	___	___	___	___
F. Uses sound judgement in making decisions.	___	___	___	___
G. Meets deadlines promptly.	___	___	___	___
H. Interviews, selects, assigns, and evaluates personnel appropriately.	___	___	___	___
I. Provides detailed and timely written reports based on well documented facts and latest research.	___	___	___	___

	S	N	U	N/A
III. SCHOOL-COMMUNITY RELATIONS				
A. Interprets school/department program to community.	___	___	___	___
B. Demonstrates a sense of loyalty to the Superintendent, school system and its role in the community.	___	___	___	___
C. Develops a structured and systematic plan for staff and parent participation in educational planning, policy making, problem solving, and evaluation of school/department.	___	___	___	___
D. Develops a clear and effective two-way system of communication between the school and department, and the community and school system.	___	___	___	___
E. Assists to develop high morale among staff and community.	___	___	___	___
IV. HUMAN RELATIONS				
A. Establishes a climate of trust and security for students and staff.	___	___	___	___
B. Respects the rights of students, parents, staff and associates.	___	___	___	___
C. Handles individual relationships tactfully and with understanding.	___	___	___	___
D. Accepts the dignity and worth of individuals without regard to appearances, race, religion, creed, sex, or status.	___	___	___	___
V. PROFESSIONAL COMPETENCIES AND GROWTH				
A. Keeps abreast of any new developments in education.	___	___	___	___
B. Pursues a planned program of professional growth.	___	___	___	___
C. Demonstrates competencies in area of expertise.	___	___	___	___
VI. PERSONAL QUALITIES				
A. Demonstrates emotional stability.	___	___	___	___
B. Recognizes own strengths and limitations.	___	___	___	___
C. Accepts constructive suggestions and adapts to change.	___	___	___	___
D. Shows sustained effort and enthusiasm in the quality and and quantity of work accomplished.	___	___	___	___
E. Listens understandingly.	___	___	___	___
F. Communicates effectively using standard oral and written English.	___	___	___	___
G. Attendance, punctuality.	___	___	___	___
H. Task orientation.	___	___	___	___

SUMMARY OF AREAS OF PROFICIENCY AND JOB ACCOMPLISHMENT:

AREAS NEEDING IMPROVEMENT:

RECOMMENDATIONS (INSERVICE, TRAINING, ETC.)

SUPERVISOR'S COMMENTS AND OTHER RECOMMENDATIONS:

OVERALL COMPOSITE APPRAISAL

SATISFACTORY DEVELOPMENT REQUIRED UNSATISFACTORY

Signature Title Date

EMPLOYEE SIGNATURE AND COMMENTS:

I have read and discussed the contents of this appraisal with my supervisor.

Signature Date

COMMENTS:

REVIEW OFFICER COMMENTS: (Optional)

ADDENDUM
AREAS NEEDING IMPROVEMENT

Appendix K

Certificated Staff Appraisal Report

CERTIFICATED

STAFF APPRAISAL

REPORT

CONFIDENTIAL

CONFIDENTIAL

Name: _____ School: _____

Title: _____ Subject Area: _____

S.I.N. [_ _ - _ _ _ _ _ _] Grade(s) Level: _____

Summary of Assigned Duties: _____

Number of classroom visits upon which appraisal is based: _____

FORMAL COMPOSITE APPRAISAL REPORT

CONTRACT: ☐ Regular ☐ First Year ☐ Temporary

YEARS ON STAFF: _____ Yrs. at Present School: ☐ 1st ☐ 2nd ☐ 3rd ☐ 4th or more

CATEGORY: Probation ___ Required Schedule ___

Permanent Certificate ___ Transfer Requested ___ Leave ___

Concerns ___ Resigning ___ Other ___

APPRAISAL CODE:

Satisfactory: Satisfactory covers a range of measurement from superior through satisfactory and is to be interpreted in terms of the teacher's level of experience in his/her present position. (S)

Needs Improvement: Needs improvement covers a range of measurement between satisfactory and unsatisfactory and is to be interpreted in terms of the teacher's level of experience in his/her present position. (NI)

Unsatisfactory: Unsatisfactory covers a range of measurement from uncertainty as to whether the teacher is meeting his/her responsibilities adequately through definite certainty that he/she should not remain in the present position. (US)

PERFORMANCE STATEMENT		S	NI	US
	Comments			
CRITERIA (See Policy SF 0020) Preparation for Teaching				
Presentation of Learning Activities				

		S	NI	US
Learning Process				
Classroom Management				
Communication and Interpersonal Skills				
Characteristics				
Demonstrates Support Toward Fulfilment of purposes of Catholic Schooling				

Summary of Areas of Proficiency and Job Accomplishment (be specific)

Areas Needing Improvement (be specific)

Recommendations (professional inservice, training, etc.)

Supervisor's Comments and Other Recommendations:

Overall Composite Appraisal (please check)

☐ Satisfactory ☐ Needs Improvement ☐ Unsatisfactory

Signature Title Date

Please attach any/all additional evaluation reports which have been prepared and discussed with employee.

Employee Signature and Comments:

I have read and discussed the contents of this appraisal with my supervisor.

Signature Date

COMMENTS:

Signature Title Date

Review Officer Comments: (Optional)

Appendix L

List of Contents for School Boards

Policy and Appraisal Manual

This policy statement and manual has been prepared for teachers, supervisors, consultants, coordinators, principals and administrators. The purpose is to inform, provide clarification, and to create staff awareness of all the components of an effective staff appraisal program. It outlines roles and responsibilities and identifies system expectations for the evaluative process.

It is hoped that all find value in this information.

Superintendent of Schools

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Appendix M

Job Descriptions for Consultants

COMPUTER CONSULTANT

JOB DESCRIPTION

QUALIFICATIONS:

1. A minimum Bachelor of Education Degree, preferred graduate school studies in Educational Technology. Course work or training in the area of computer education is an asset.

2. A minimum of 5 years of experience as an educator.

3. Related inservice and resource experience.

4. Practical experience in working with teachers, parents and students, planning and evaluation strategies.

REPORTS TO:

Assistant Superintendent, Human Resources & Instructional Technology.

WORKS WITH:

Students, parents, staff members and school administrators in grades K-12.

KEY FUNCTION:

To assist the Superintendent (or designate) substantially and effectively in the task of providing leadership in developing, achieving, maintaining and implementing programs for the computer and related technology as an educational resource.

SPECIFIC TASKS/RESPONSIBILITIES:

1. Assists the Superintendent (or designate) to fulfill the general goals and specific purposes of the district's Educational Computing Plan.

2. Assists the Superintendent (or designate) with the development implementation, and evaluation of the district's Computer Education Program.

3. Provides staff leadership to ensure understanding and promotion of the objectives of the school district.

4. Provides consultative assistance to teachers, principals and other administrators relative to the computer and related technology as an educational resource.

5. Conducts periodic assessments of the development needs of staff as it relates to the instructional use of computers.

6. Plans, organizes and conducts staff development activities, relative to computers and related technology to meet staff and student needs.

7. Assists to communicate the Educational Computing plan to the community, staff and students alike.

8. At the request of the Superintendent (or designate) conducts parent and community meetings for the lay public and interprets the latest methods and content in the use of computers and related technology as an educational resource.

9. At the request of the superintendent (or designate) prepares written materials for distribution to the lay public on topics specifically related to Computers in Education.

10. To assist with the planning and development of meaningful curriculum materials for computers.

11. Assists in the selection, procurement and distribution of computer software.

12. Reports on the status requirements and needs of the district Education Computing Plan, as required.

13. Assists the Superintendnet (or designate) in planning for any expansion of the use of computers.

14. Assumes those teaching and related duties as may be assigned by the Superintendent (or designate).

15. Attends meetings and prepares such reports as may be required.

16. Performs such other task and assumes such other responsibilities as may be assigned by the Superintendent (or designate).

TERM OF EMPLOYMENT:

School calendar year plus required days prior to school year opening and closing. The position will remain in effect only for the duration of the approved project. Normally will be a two-year appointment.

EVALUATION:

First year is a probationary year. Performance, thereafter, of this position will be evaluated annually in accordance with the provisions of the Board's policy on Staff Appraisal.

Approved by the
Superintendent of Schools
October 1987.

EVALUATION:

First year is a probationary year. Performance thereafter of this position will be evaluated in accordance with provisions of the Board policy on staff appraisal.

Approved by the
Superintendent of Schools, August, 1984.

RELIGIOUS EDUCATION COORDINATOR

JOB DESCRIPTION

QUALIFICATIONS:

1. Preferably a Masters Degree or higher from a university with emphasis in religious studies, theology and scripture.

2. A minimum of 5 years of experience as an educator.

3. Related inservice and administrative/resourse experience.

4. Practical experience in working with teachers, parents and students, planning, and evaluative strategies.

5. Eligibility for Alberta Certification.

REPORTS TO:

Superintendent of Schools.

WORKS WITH:

Staff members and school administrators in grades K-12. Liaison responsibility with parents and Parish Team on pastoral matters.

SUPERVISES:

Effectiveness of religious education program.

KEY FUNCTION:

To assist the Superintendent (or designate) substantially and effectively in the task of providing leadership in developing, achieving, maintaining and implementing the best possible religious educational programs and services to ensure that each student is provided with the richest spiritual and educational experience the district can provide.

SPECIFIC DUTIES AND RESPONSIBILITIES:

1. Assists the Superintendent in directing and coordinating the district's religious education and related programs.

2. Provides staff leadership to ensure understanding and promotion of the objectives of the school district.

3. To assist school personnel in the understanding of Church doctrine, theology and Sacred Scriptures.

4. Guides development, implementation and evaluation of religious education curriculum and instructional services.

5. Works with principals, other administrators, and teacher committees in organizing and coordinating grade level and departmental meetings in order to effect horizontal and vertical continuity and articulation.

6. Conducts periodic assessments of the development needs of all categories of staff as it related to the Catholic Christian mandate of the school district.

7. Plans, organizes and implements staff development (inservice) activities to meet staff, student and parent needs.

8. Observes teachers in their classrooms re religious education program teaching and offers assistance and insights for the enhancement of the teacher-learning situation.

9. Works to create awareness, understanding, acceptance and development of Christian Community.

10. Develops opportunities in cooperation with school staffs for retreats, live-ins, celebrations/prayer sessions, and/or other forms of spiritual growth.

11. Assists to communicate the religious education program to the parish community, staff, parents and students alike.

12. Works with the Parish Team in coordinating parish and school religious association through the framework of the schools.

13. Fosters a sense of religious/spiritual renewal within the school district.

14. Reports on the status, requirements and needs of the district religious education program and services at the request of the Superintendent.

15. Assists in the preparation of the budget as it pertains to area of responsibility.

16. Attends Board meetings and prepares such reports for the Board as the Superintendent may request.

17. Performs such other tasks and assumes such other responsibilities as may be assigned by the Superintendent.

TERM OF EMPLOYMENT:

School Year Calendar plus required days prior to school year opening and closing.

EVALUATION:

First year is a probationary year. Performance thereafter, of this position will be evaluated annually in accordance with provisions of the Board's policy on evaluation of administrators.

Approved by the
Superintendent of Schools, August, 1984

SPECIAL EDUCATION COORDINATOR

JOB DESCRIPTION

QUALIFICATIONS:

1. Preferably a Masters Degree or higher with emphasis in special education, diagnosis and prescriptive program writing for exceptional children.

2. A minimum of 3 years teaching experience.

3. Related inservice and resource experience.

4. Practical experience in working with teachers, parents and students, planning, and evaluation strategies.

5. Eligibility for Alberta Certification.

REPORTS TO:

Assistant Superintendent, Curriculum and Instruction.

WORKS WITH:

Students, parents, staff members and school administrators in grades K-12. Liaison responsibility with other agencies on special education matters.

SUPERVISES:

Effectivensss of special education programs.

KEY FUNCTION:

To assist the Assistant Superintendent, Curriculum and Instruction substantially and effectively in the task of providing leadership in developing, achieving, maintaining and implementing the best possible special education programs and services to ensure that each student is provided with the richest educational experience the district can provide.

SPECIFIC DUTIES AND RESPONSIBILITIES:

1. Assists the Assistant Superintendent, Curriculum and Instruction in directing and coordinating the district's special education and related programs.

2. Provides staff leadership to ensure understanding and promotion of the objectives of the school district.

3. To assist school personnel in the understanding of special education philosophy and practices.

4. Guides development implementation and evaluation of special education curriculum and instructional services.

5. Provides consultative assistance to teachers, principals and other administrators relative to special education.

6. To assist special education teachers in diagnosing the individual development of each student and to assist in writing individualized prescriptive programs.

7. To assist special education teachers in developing educational programs corresponding to individual prescriptions.

8. Observes special education teachers in their classrooms re: special education program teaching and offers assistance and insight for the enhancement of the teacher-learning situation.

9. Works to identify program and instructional material needs in special education.

10. Assists in the implementation of new special education programs.

11. To assist in planning and developing sequentially organized curriculum programs in special education.

12. Assists to communicate the special education program to the community, staff, parents and students alike.

13. Assists in the requisitioning, development, and cataloguing of programs and materials.

14. Plans, organizes and implements staff development (inservice) activities to meet staff, student and parent needs.

15. Participates as a member of the team of resource personnel employed to provide for the delivery of services to special needs students.

16. Reports on the status requirements and needs of the district special education programs and services, as required.

17. Assists in the preparation of the budget as it pertains to area of responsibility.

18. Attends meetings and prepares such reports as may be required.

19. Performs such other tasks and assumes such other responsibilities as may be assigned by the Assistant Superintendent, Curriculum and Instruction.

TERM OF EMPLOYMENT:

School Year Calendar plus required days prior to school year opening and closing.

EVALUATION:

First year is a probationary year. Performance thereafter of this position will be evaluated annually in accordance with provisions of the Board policy on evaluation of administrators.

Approved by the
Superintendent of Schools, August, 1984

SECOND LANGUAGE CONSULTANT

JOB DESCRIPTION

QUALIFICATIONS:

1. Bilingual (French/English).
2. Course work related to French Immersion.
3. A minimum of 5 years of experience as an educator.
4. Related inservice and administrative/resource experience.
5. Practical experience in working with teachers, parents and students, planning and evaluative strategies.
6. Eligibility for Alberta Certification.

REPORTS TO:

Assistant Superintendent,, Curriculum and Instruction.

SPECIFIC DUTIES AND RESPONSIBILITIES:

1. Assists the Superintendent in facilitating and coordinating the district's second languages and related programs.
2. Provides staff leadership to ensure understanding and promotion of the objectives of the school district.
3. Under the direction of the Assistant Superintendent, guides development, implementation and evaluation of second languages curriculum and instructional services.
4. Works with principals, other administrators and teacher committees in organizing and coordinating grade level and departmental meetings in order to effect horizontal and vertical continuity and articulation.
5. Conducts periodic assessments of the development needs of staff as it relates to second languages instruction.
6. Assists the Superintendent/Assistant Superintendent in planning for the expansion of programs.
7. Performs such other tasks and assumes such other responsbilities as may be assigned by the Assistant Superintendent.
8. Visits classrooms and works with teachers from K through 12 on instructional and curricular matters peculiar to his/her discipline or subject area.

9. Works with the principals in a staff relationship and shares his/her particular knowledge and competence as needed.

10. Reports to the Assistant Superintendent and keeps him informed on the developing curriculum and new trends and research in his/her own area of specialization.

11. Chairs the district curriculum committees in his/her discipline or subject area.

12. Makes recommendations to the appropriate officials concerning instructional and curricular materials and resources.

13. Conducts parent and community meetings for the lay public on topics related to subject.

14. Prepares written materials for distribution to the lay public on topics related to subject.

15. Supplies information and materials that can contribute to the improvement of teaching.

16. Works cooperatively with staff in developing meaningful curriculum materials.

17. Assists in the orientation of new teachers.

18. Aids the principals as consultants in the organization of instruction, teaching procedures and experimentation.

19. Assists the Assistant Superintendent and the principals in the development of a sound program of evaluation.

20. Aids the Assistant Superintendent and principals in developing a comprehensive program of in-service education for all professional staff members.

21. Aids the Assistant Superintendent and principals in the selection, procurement and distribution of textbooks, library books, and all categories of instructional supplies and equipment.

TERM OF EMPLOYMENT:

School calendar year plus required days prior to school year opening and closing. The position will remain in effect only for the duration of the approved project. Normally will be a two-year appointment.

EVALUATION:

First year is a probationary year. Performance, thereafter, of this position will be evaluated annually in accordance with the provisions of the Board's policy on Staff Appraisal.

Approved by the
Superintendent of Schools, August, 1984

GIFTED CONSULTANT

JOB DESCRIPTION

QUALIFICATIONS:

1. A Bachelor of Education Degree. Course work or training in the area of gifted education would be an asset.
2. A minimum of 5 years of experience as an educator.
3. Related inservice and resource experience.
4. Practical experience in working with teachers, parents and students, planning and evaluation strategies.
5. Eligibility for Alberta Certification.

REPORTS TO:

Assistant Superintendent, Curriculum and Instruction.

WORKS WITH:

Students, parents, staff members and school administrators in grades K-12.

KEY FUNCTION:

To assist the Superintendent (or designate) substantially and effectively in the task of providing leadership in developing, achieving, maintaining and implementing programs for the gifted.

SPECIFIC TASKS/RESPONSIBILITIES:

1. Assists the Superintendent (or designate) to fulfill the general goals and specific purposes of the district's Gifted Program.
2. Assists the Superintendent (or designate) with the development, implementation, and evaluation of the district's Gifted Program.
3. Provides staff leadership to ensure understanding and promotion of the objectives of the school district.
4. Provides consultative assistance to teachers, principals and other administrators relative to the Gifted Program.
5. Conducts periodic assessments of the development needs of staff as it relates to the Gifted Program.
6. Plans, organizes and conducts staff development activities, relative to the Gifted Program, to meet staff and student needs.

7. Assists to communicate the Gifted Program to the community, staff, parents and students alike.

8. At the request of the Superintendent (or designate) conducts parent and community meetings for the lay public and interprets the latest methods and content in the gifted area.

9. At the request of the Superintendent (or designate) prepares written materials for distribution to the lay public on topics specifically related to the Gifted Program.

10. To assist with the planning and development of meaningful curriculum materials for the gifted.

11. Assists in the selection, procurement and distribution of instructional materials for the gifted.

12. Reports on the status requirements and needs of the district Gifted Program, as required.

13. Assists the Superintendent (or designate) in planning for any expansion of the Gifted Program.

14. Chairs the Gifted Program Committee for the school district.

15. Assumes those teaching duties as may be assigned by the Superintendent (or designate).

16. Attends meetings and prepares such reports as may be required.

17. Performs such other tasks and assumes such other responsibilities as may be assigned by the Superintendent (or designate).

TERM OF EMPLOYMENT:

School calendar year plus required days prior to school year opening and closing. The position will remain in effect only for the duration of the approved project. Normally will be a two-year appointment.

EVALUATION:

First year is a probationary year. Performance, thereafter, of this position will be evaluated annually in accordance with the provisions of the Board's policy on Staff Appraisal.

Approved by the
Superintendent of Schools, November, 1983.

EFFECTIVE SCHOOLING CONSULTANT

JOB DESCRIPTION

QUALIFICATIONS:

1. A Bachelor of Education degree. Graduate work with emphasis in Curriculum and Instruction would be an asset.

2. A minimum of 5 years of experience as an educator.

3. Related inservice and resource experience.

4. Practical experience in working with teachers, parents and students, planning and evaluation strategies.

5. Eligibility for Alberta Certification.

REPORTS TO:

Assistant Superintendent, Operations and Personnel.

WORKS WITH:

Staff members and administrators in grades K-12. Students and parents as required.

KEY FUNCTION:

To assist the Superintendent (or designate) substantially and effectively in the task of providing leadership in developing, achieving, maintaining and implementing programs for improved effectiveness in schooling.

SPECIFIC TASKS/RESPONSIBILITIES:

1. Assists the Superintendent (or designate) with the development, implementation, and evaluation of the district's Effective Schooling program.

2. Assists the Superintendent (or designate) to fulfill the general goals and specific purposes of the district's Effective Schooling program.

3. Provides staff leadership to ensure understanding and promotion of the objectives of the school district.

4. Provides consultative assistance to teachers, principals and other administrators relative to effective schooling.

5. Conducts periodic assessments of the development needs of staff as it relates to effective teaching and schooling.

6. Observes teachers in their classrooms and offers assistance and insights for the enhancement of the teaching-learning situation.

7. Plans, organizes and conducts staff development activities, relative to effective schooling, to meet staff and student needs.

8. Attends meetings and prepares such reports as may be required.

9. Performs such other tasks and assumes such other responsibilities as may be assigned by the Superintendent or designate.

TERM OF EMPLOYMENT:

School Year Calendar plus required days prior to school year opening and closing. The position will remain in effect only for the duration of the approved project. Normally will be a two-year appointment.

EVALUATION:

First year is a probationary year. Performance, thereafter, of this position will be evaluated annually in accordance with provisions of the Board's policy on Staff Appraisal.

Approved by the
Superintendent of Schools, November, 1983.

SPECIAL EDUCATION DIAGNOSTICIAN

JOB DESCRIPTION

QUALIFICATIONS

1. Preferably a Masters Degree or higher from a university with emphasis in educational psychology and psycho-educational assessment.

2. A minimum of 3 years experience in education.

3. Related inservice and resource experience.

4. Practical experience in working with teachers, parents and students.

5. Eligibility for Alberta Certification as a Psychologist or registration as Personnel Approved to Provide Service to Children with Learning Disabilities.

6. Eligibility for Alberta Teacher Certificate.

REPORTS TO:

Special Education Coordinator.

WORKS WITH:

Students, parents, staff members and school administrators in Grade K-12. Liaison responsibility with other agencies on matters pertaining to students referred to the Special Education Diagnostician.

KEY FUNCTION:

To assist the school district staff substantially and effectively in the task of developing, maintaining and implementing the best possible educational programs and services to ensure that each student is provided with the richest educational experience the district can provide.

SPECIFIC DUTIES AND RESPONSIBILITIES:

1. Whereas guidance counsellors provide services of a developmental and preventative nature, the Special Education Diagnostician will provide service of a corrective nature.

2. To assist school personnel in understanding the psychological factors which influence children.

3. Provides assistance to guidance counsellors, teachers, principals and others relative to the needs of students.

4. To carry out individual assessments of students, Grades K-12, with respect to their educational and psychological needs. This may include individual testing, classroom observation, case conferences, individual program development, outside referral and liaison with other agencies.

5. Prepares written reports on all students referred to the Special Education Diagnostician.

6. Interprets all individual assessment results to appropriate people, such as guidance counsellors, teachers, principals and parents.

7. To assist in the identification and placement of special education students.

8. Assists in the developing and evaluating of special education programs.

9. To initiate case conferences relative to student referrals, when required.

10. To assist in the planning, organizing and implementing of staff development (inservice) activities to meet staff, student, and parent needs.

11. Assists in administering the System pupil attendance policies by investigating and following up chronic attendance problems referred by the principals.

12. Participates as a member of the team of resource personnel employed to provide for the delivery of services to special needs students.

13. Attends meetings and prepares reports, as required.

14. Performs such other tasks and assumes such other responsibilities as may be assigned by the Assistant Superintendent, Curriculum and Instruction.

TERM OF EMPLOYMENT:

School Year Calendar.